



BAYLOR UNIVERSITY

SAMPLE LANGUAGE FOR CHARITABLE BEQUESTS

The following provides some suggested methods and wording for remembering Baylor University in your will.

SPECIFIC BEQUEST: “I give \$_____ (or a percentage of my estate) to Baylor University, a Texas Non-Profit Corporation located in Waco, Texas.”

- OR -

“I give the following described property to Baylor University, a Texas Non-Profit Corporation located in Waco, Texas:

_____.”

RESIDUARY BEQUEST: “I give all (or a percentage) of the remainder of my estate to Baylor University, a Texas Non-Profit Corporation located in Waco, Texas.”

CONTINGENT BEQUEST: “In the event (primary beneficiary) does not survive me, I give said amount to Baylor University, a Texas Non-Profit Corporation located in Waco, Texas.”

DESIGNATION

RESTRICTED BEQUEST: This bequest specifies how you want the funds to be used. For example, you may wish to designate your bequest for student scholarships, a chair, a professorship or an area of study. If this is your desire, please contact us to ensure your goals and desires can be accomplished.

HONORARY OR MEMORIAL BEQUEST: This is a gift that pays tribute to or memorializes a person. We are pleased to honor your request and have many ways to grant appropriate recognition.

ENDOWED BEQUEST: This bequest requires Baylor University to hold the funds permanently and use only the distributable earnings. Your gift continues giving in perpetuity.

As an example: “I give (amount, description of asset, percentage of estate, remainder, etc.) to Baylor University, a Texas Nonprofit Corporation located in Waco, Texas, for the purpose of establishing the _____
Endowed Scholarship Fund in _____.

Baylor University will distribute only the earnings from the fund as specified by this request.”

If you choose to direct a bequest to Baylor, we encourage you to share your plans with us. Your plans remain confidential and we are able to ensure that when the time comes, Baylor understands and can abide by your bequest intentions.

We also would like to recognize your generosity through membership in the Old Main Society, which honors those who have made deferred gifts to the university. Your benevolence demonstrates an investment in Baylor’s students and mission for generations to come.

The mission of Baylor University is to educate men and women for worldwide leadership and service by integrating academic excellence and Christian commitment within a caring community.

BEQUEST INTENTION LETTER

Dear President Starr:

It is my (our) pleasure to inform you that I (we) have named Baylor University in Waco, Texas, as a beneficiary of an estate gift. This letter signifies my (our) intention to make a bequest through my (our) estate plan of approximately \$_____ for the further benefit of _____

[ENDOWED FUND, COLLEGE, SCHOOL, UNIT].

This gift will take the form of _____
[BENEFICIARY OF A WILL, TRUST, LIFE INSURANCE POLICY, IRA OR RETIREMENT PLAN, BANK/INVESTMENT ACCOUNT, OTHER].

Understanding that this gift intention may be changed at any time, I (we) will inform you should I (we) change my (our) intent toward Baylor University or should the dollar value of my (our) estate's potential donation significantly increase or decrease.

Investing in the future of Baylor University gives me (us) great satisfaction in knowing that my (our) gift will help future generations of Baylor students.

Sincerely,

Signature

Date

Signature

Date

Name(s): _____

Address: _____

City, State, ZIP: _____

E-mail: _____

Thank you for sharing this information to ensure that when the time comes, Baylor University understands and can abide by your bequest intentions. Your plans will remain confidential.

Please return to:
Office of Gift Planning, Baylor University
One Bear Place #97026
Waco, Texas 76798-7026

As with any decision involving your assets, we urge you to seek the advice of your professional counsel when considering a gift to Baylor University.