



BEQUESTS



OLIN
SOCIETY

Bequests: Leave a Legacy

Including Wesleyan in your will or revocable trust is a simple and enduring way to sustain the liberal arts tradition of teacher-scholars and students learning together.

What are different types of bequests? You can give almost any kind of asset to Wesleyan through a bequest, including:

- Cash
- Securities
- Closely-held stock
- Interest in real estate (a primary or vacation residence)
- Tangible personal property (works of art or antiques)
- Remainder of your IRA, Keogh, tax-sheltered annuity, qualified pension, or profit-sharing plan

Ask your attorney about your bequest options, such as specific bequests, residuary bequests, testamentary trusts and QTIP trusts. Bequests can be designated as a specific value or as a percentage of your estate.

What are the tax benefits?

- A charitable bequest is deductible for federal estate tax purposes, and there is no limit on the amount of the estate tax charitable deduction your estate can take.
- Charitable bequests are generally not subject to state inheritance or estate taxes.

Wesleyan University does not provide legal or tax advice. We advise you to seek your own legal and tax advice in connections with gift and planning matters.

YOUR LEGACY IS WESLEYAN'S FUTURE

Join over 1,500 members of this community who have made a commitment to the future of Wesleyan through a planned gift. By establishing a planned gift for Wesleyan, you will become part of the Olin Society, which honors alumni, spouses, families, and friends who have included the University in their estate plans. The Society is named for Stephen Henry Olin, Class of 1866, and his wife Emeline, who nurtured the growth of the University and helped fund the construction of Olin Library with an innovative charitable annuity.

THIS IS NOT A CAMPAIGN. THIS IS WESLEYAN.

mywesleyanlegacy.org | plannedgiving@wesleyan.edu

MARK DAVIS '96
Senior Philanthropic Advisor &
Director of Gift Planning
860.685.3660

KATE QUIGLEY LYNCH '82, MALS '20, P'17,'19
Senior Associate Director of Gift Planning
860.685.5992

ELIZABETH RACCIO, MBA
Associate Director of Gift Planning,
Administration
860.685.5775



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How To Make A Bequest

A bequest to Wesleyan can be made by including the University in your will or revocable living trust. If you include Wesleyan in a bequest provision, please notify the Office of Gift Planning so that we may welcome you as a member of the Olin Society. Your bequest intention will be treated confidentially.

Sample bequest language - the following examples can be tailored to meet your needs and interests. Please consult your attorney for assistance in establishing a bequest.

Unrestricted Bequest: “I give (specific dollar amount/a specific asset, or percentage of the rest, residue, and remainder of my estate) to Wesleyan University, the charitable, tax-exempt organization located in Middletown, Connecticut, for its general purposes.”

Bequest for a specific purpose: “I give (specific dollar amount/a specific asset, or percentage of the rest, residue, and remainder of my estate) to Wesleyan University, the charitable, tax-exempt organization located in Middletown, Connecticut, to be used for the following purpose: (state the purpose). NOTE: If you wish to restrict your bequest to a specific purpose or program at Wesleyan, please contact the Office of Gift Planning in advance to be sure the language you include will accomplish your wishes and align with the University’s needs.

Endowment funds for a restricted purpose: If your bequest will be used to establish an endowment fund for a restricted purpose, consider adding a “saving clause” to your bequest provision as a way to ensure the usefulness and relevance of your bequest in the future as the University’s needs and the priorities change. For example: “If, in the future, it is the opinion of the Board of Trustees at Wesleyan University that all or part of the income of this fund cannot be usefully applied to such purpose, it may be used for any related purpose which, in the sole opinion of the Board of Trustees, will most nearly accomplish my wishes.”

Founded in 1831, Wesleyan University’s Federal ID number is: 06-0646959

When you make a bequest to Wesleyan, you become a member of the **Olin Society** and join over 1,500 members of this community who have made a commitment to the future of Wesleyan through a planned gift.

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