



Widener University

WIDENER UNIVERSITY BEQUEST INTENTION FORM

Including Widener in your Estate Plan

Bequests and other testamentary gifts by generous donors are an important source of financial resources to Widener University. Continuing and expanding our tradition of support from alumni and friends will contribute to Widener's future and our legacy of academic preparation for lives of meaning and purpose.

A gift to the university through your estate plan qualifies you as a member of Widener Legacy Society, a key group of individuals whose foresight builds the future of Widener.

You can make a specific gift to Widener of cash, securities, real estate, or other property through your will, codicil, or trust. You can designate Widener as the beneficiary of the entirety of your estate, a percentage, a fixed amount, or a remainder interest, or as a contingent beneficiary. You can also name Widener as a beneficiary of your retirement accounts or life insurance policy.

A bequest to Widener may qualify your estate for a reduction or complete avoidance of estate taxes.

If you wish to document your bequest intention at this time, please complete and return the form below to Office of Development and Alumni Engagement, 1 University Pl, Chester, PA 19013, fax a copy to 610-499-1349, or scan and email a copy to balewis1@widener.edu

Widener University has been recognized by the United States Internal Revenue Service as a Section 501(c)(3) tax-exempt organization. Our federal tax ID number is 23-1386178.

(CUT HERE)

Documenting Our Planned Gift Intention

I/we want to make Widener University aware that I/we have provided for the University through a planned or deferred gift.

My/our Name(s): _____

Address: _____

Telephone: _____ E-mail(s): _____

Signature(s): _____ Date: _____

My/our charitable plans for Widener are: _____ Revocable _____ Irrevocable _____ Anonymous

Widener University recommends that all persons considering a planned or deferred gift consult with their professional advisors. Also, the university encourages alumni and friends to discuss their plans with staff to ensure their wishes are understood and that Widener can comply with those wishes.

Please note that this form notifies Widener of your plans, but is not binding in any way.

(See reverse to provide details of your intention)



Widener University

Sample Testamentary Language:

“I give (dollar amount) or (a specific asset, such as securities, real estate, or other property) or (all) or (percent of the rest, residue, and remainder of my estate) to Widener University, an educational institution located in Chester, Pennsylvania, for (the area of greatest need as the President of Widener University may determine) or (for the following purpose, school, fund, or program: _____).”

You may designate your gift for the benefit of an academic program, school, scholarship, athletic team, or facility at Widener. You may ask that the gift be endowed according to the policies of Widener and our Board of Trustees, or you may permit the university to determine the best course of action based on the needs of the moment when the gift is realized.

We strongly recommend including the following sentence as well, to ensure that the evolving needs of future generations can be met:

"If my gift cannot be used according to this paragraph due to legal or other restrictions, I authorize the President of Widener University to make such modifications as will appropriately recognize my interests in a way that meets with university priorities."

Do you need more information?

Please contact Brian Lewis at balewis1@widener.edu, or call 610-499-4113.

One University Place, Chester, PA 19013 | t: 610-499-4486 | f: 610-499-1349 | e: devoffc@widener.edu | www.widener.edu

(CUT HERE)

Documenting Our Planned Gift Intention (continued)

My/our planned gift is in the form of a:

_____ Bequest

_____ Charitable Gift Annuity

_____ Beneficiary Designation

_____ Type(s): _____ (life insurance, 401(k), IRA, et cetera)

_____ My account is currently managed by: _____

_____ Testamentary Trust

(You may choose to name the trustee, if known): _____

_____ Other (please describe): _____

If your gift is in the form of real property or non-liquid assets, such as a home, vehicle, or art, please describe:

_____ Current estimated value of this gift:

(A good faith current estimate is all that is needed.)

My/our designation for this gift:

Unrestricted/area of greatest need _____

Restricted (Please indicate purpose): _____
