



INCLUDING WIDENER IN YOUR ESTATE

Your values can create your legacy.

As a proud Widener alum, you know the life-changing power of this education. A gift through your estate will extend that impact to future generations—helping students discover their potential, pursue their passions, and lead in their communities. Your legacy will strengthen Widener’s mission and ensure others benefit from the same transformative opportunities that shaped your journey.

You can make a planned gift to Widener in several ways . The easiest and most common is listing Widener as a beneficiary of your will or trust. You can give cash, stocks and bonds, real estate, or other property. Your gift to Widener could be your entire estate, a percentage, or a fixed dollar amount. You can also name Widener to receive the remainder after other gifts are made. Or you can make Widener a secondary beneficiary if your first choice can't receive their share.

If you have a retirement account or life insurance policy, Widener can be named as the beneficiary of those gifts as well, which may help reduce tax burdens for your other chosen recipients.

When you plan ahead and document your gift to the university in your estate plan, you also become a valued member of the Widener Legacy Society.

IT'S EASY TO GET STARTED

To document your gift intention, please complete and return the non-binding form on the reverse 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

Use this sample Testamentary Language as a guide:

"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 ask us to use your gift to benefit an academic program, school, scholarship, athletic team, or facility at Widener. You can also ask that the gift be endowed so that it is invested and lasts as long as Widener does [*a minimum gift amount may apply to maximize the power of this kind of fund*], or you may let Widener 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 make sure 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."

Need more info? Contact Brian Lewis at balewis1@widener.edu, or call 610-499-4113.

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.

PLANNED GIVING DECLARATION

To support the educational mission of Widener University, I/we have included a gift as part of my/our overall estate plan and wish to ensure that Widener is aware of this intention.

My/Our contact Information

My/our Name[s]: _____

Address: _____

Telephone: _____ E-mail[s]: _____

Signature[s]: _____ Date: _____

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

My/Our Impact

This planned gift is in the form of a:

☐ Bequest

☐ Beneficiary Designation

Type[s]: ☐ Life insurance ☐ 401(k) ☐ IRA ☐ Other _____

My account is currently managed by: _____

☐ Testamentary Trust *[Please provide the name of 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]:*

If you are working with an attorney, please provide their name[s], firm name[s], and telephone number[s]: _____

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.

Your plans may change, and Widener understands that! Remember that this form notifies Widener of your plans, but is not binding in any way. We simply ask that you please let us know if you are adjusting your commitment to Widener.