

Samples of Gift Language (for use in either a will or trust document)

"I leave ___*[see below]_____ to the **University of Massachusetts Amherst** (the "University"), 181 Presidents Drive, Amherst, MA 01003, Tax ID# 04-3167352, ..."

To establish an expendable fund or contribute to an existing expendable/current use fund:

"...for the ___ [name of fund]_____ fund to be used as set forth in a separate gift agreement with the University."

To establish an endowed fund or contribute to an existing endowed fund add to the end:

"...for the ___ [name of fund]_____ fund to be used as set forth in a separate gift agreement with the University and the University of Massachusetts Foundation."

To give to a specific program or unit:

"...for _____ [name of program or unit]_____."

To UMass Amherst general purposes:

"... for its general purposes."

***Kinds of bequests (to be inserted above):**

A specific asset may be name: _This language is used when you want to leave a specific dollar amount or a specific asset (e.g., specific dollar amount, specific stock, real estate, tangible personal property, intellectual property, etc.)

Percentage of residuary estate clause: _This language is used when you want to leave a specific percentage of the assets remaining in your estate *after* all of the debts and expenses of the estate have been paid, and after all specific bequests have been satisfied.

"I leave ___ percentage (___%) of the rest, residue and remainder of my estate to..."

Entire residuary estate clause: _This language is used when you want to leave the *entire* balance remaining in your estate *after* all of the debts and expenses of the estate have been paid, and after all specific bequests have been satisfied. In place of "I leave":

"I give, devise and bequeath the rest residue and remainder of my estate to..."

Contingency provision clause: This language is used when you want to have the University of Massachusetts Amherst to be a substitute beneficiary in the event that your primary beneficiary has predeceased you.

"In the event that my (spouse, daughter, son, friend – use full name) shall predecease me, I leave..."

Note: These are samples of bequest language to meet your gifting intentions. It is important that you seek the assistance and guidance of your estate planning attorney. Most jurisdictions allow for incorporation by reference of a gift agreement if the gift agreement is in place prior to the execution of the will.