

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

For general purposes:

"I give ___*[see below]_____ to the University of Massachusetts Amherst Foundation, tax ID# 54-2084125, for its general purposes."

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

"I give ___*[see below]_____ to the University of Massachusetts Amherst Foundation, tax ID# 54-2084125, for the ___[name of fund]_____ fund to be used as set forth in a separate gift agreement with the University of Massachusetts Amherst."

To contribute to an existing endowed fund:

"I give ___*[see below]_____ to the University of Massachusetts Amherst Foundation, tax ID# 54-2084125, for the ___[name of fund]_____ fund at the University of Massachusetts Amherst."

To give to a specific program or unit:

"I give ___*[see below]_____ to the University of Massachusetts Amherst Foundation, tax ID# 54-2084125, for ___[name of program or unit]_____ at The University of Massachusetts, Amherst."

***A specific asset may be named:** You can 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: You can 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 give ___ percentage (___ %) of the rest, residue and remainder of my estate to the University of Massachusetts Amherst Foundation, tax ID# 54-2084125."

Entire residuary estate clause: You can 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.

"I give, devise and bequest the rest residue and remainder of my estate to the University of Massachusetts Amherst Foundation, tax ID# 54-2084125."

Contingency provision clause: You can name UMass 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 give to the University of Massachusetts Amherst Foundation, tax ID# 54-2084125."