



Example bequest language—Please feel free to use this sample language in preparing your will or living trust. Please contact us if you want to make a bequest to help FAU.

Specific Bequests

The specific bequest is the simplest means of making a gift at your death.

I give Florida Atlantic University Foundation, 777 Glades Road Boca Raton, FL 33431 _____ dollars (\$_____). My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

Or

I give Florida Atlantic University Foundation, 777 Glades Road Boca Raton, FL 33431 _____ (number of shares of) _____ (name of stock) of my estate (or trust). My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

Residuary Bequest

A residuary bequest is a gift of the rest of your estate remaining after all debts, taxes, expenses, and other bequests have been paid.

I give Florida Atlantic University Foundation, 777 Glades Road Boca Raton, FL 33431 _____ percent (____%) of my estate (or trust). My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

Or

I give the rest, residue and remainder of my estate (or trust) to Florida Atlantic University Foundation, 777 Glades Road Boca Raton, FL 33431. My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

Contingent Bequests

The contingent bequest provides for family and friends and will benefit the University only if the named beneficiaries predecease you.

I give to my wife all of the property in my estate (or trust), if she survives me. In the event my wife does not survive me, I give the sum of \$_____ to Florida Atlantic University Foundation, 777 Glades Road Boca Raton, FL 33431. My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

Designating a Bequest

Although an unrestricted bequest is of special value, allowing the University to use it however needed, many FAU donors have special interests that they may wish to support. You may designate the use of your bequest for such purposes as student scholarships, program or faculty needs.

Specific Bequest to Establish a Named Permanent Endowment Fund

I give the Florida Atlantic University Foundation 777 Glades Road Boca Raton, FL 33431, (_____% of the residual) or (the sum of \$ _____), to establish the John and Jane Doe Scholarship Fund. My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

- or -

I give the Florida Atlantic University Foundation 777 Glades Road Boca Raton, FL 33431, (_____% of the residual) or (the sum of \$ _____), to establish the John and Jane Doe Education Research Fund, as outlined in a gift agreement previously agreed to by the Florida Atlantic University Foundation and me. My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

- or -

I give the Florida Atlantic University Foundation 777 Glades Road Boca Raton, FL 33431, (_____% of the residual) or (the sum of \$ _____), to establish the John and Jane Doe Education Research Fund. This fund will be set up to conduct research at the Florida Atlantic University Foundation in the area of Secondary Education. My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

Specific Department or Program

Unrestricted Bequest, Designated for a Particular Department or Program

I give the Florida Atlantic University Foundation 777 Glades Road Boca Raton, FL 33431, (_____% of the residue of my estate, or trust) or (the sum of \$ _____), for the benefit of the [Academic Department/College or Program]. My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

Designated Bequest, Designated for a Particular Department or Program

I give the Florida Atlantic University Foundation 777 Glades Road Boca Raton, FL 33431, (_____% of the residue of my estate or trust) or (the sum of \$ _____), for the benefit of the [Academic Department/College or Program] for [Specific Activity]. My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

Florida Atlantic University Foundation also has types of gifts available including charitable remainder trusts, gifts of life insurance, gift annuities, and gifts to a pooled income fund. These types of gifts should be done in consultation with your attorney and/or CPA as well as a representative from the Office of Gift Planning at FAU.



You can make a significant investment in FAU's future and future generations of FAU students by joining *The True Blue Horizon Society*. Membership in this exclusive society is open to all who include FAU in their estate plans.

For further information regarding the *True Blue Horizon Society*, wills and bequests or other gift planning vehicles, please contact David Rutherford at 561-297-2119 or gift.planning@fau.edu.