



SAMPLE LANGUAGE  
FOR INCLUDING MOUNT HOLYOKE COLLEGE IN YOUR WILL

Mount Holyoke College  
50 College Street  
South Hadley, MA 01075

**Mount Holyoke's Tax ID #: 04-2103578**

The particular form of a bequest clause will be determined by the type of bequest and its designated use. Although it is possible to designate a specific purpose for a bequest, flexibility is desired in anticipating future needs. We therefore recommend that a specific purpose be stated as a preference with final determination left to the discretion of the trustees of the College.

**Unrestricted Bequest**

“I give to THE TRUSTEES OF MOUNT HOLYOKE COLLEGE<sup>1</sup> in South Hadley, Massachusetts, the sum of \$\_\_\_\_\_ (or a percentage or all of residuary estate) to be used for the benefit of Mount Holyoke College as the Trustees thereof may direct.”

**Restricted Bequest**

“I give to THE TRUSTEES OF MOUNT HOLYOKE COLLEGE in South Hadley, Massachusetts, the sum of \$\_\_\_\_\_ (or a percentage or all of residuary estate) to be used for the benefit of Mount Holyoke College, to be used with preference for (insert here how donor wishes income to be used — for example, financial aid, faculty salaries, or instruction in a particular field.)

**Bequest for Endowment - Use of Income Unrestricted - (\$100,000 minimum)**

“I give to THE TRUSTEES OF MOUNT HOLYOKE COLLEGE in South Hadley, Massachusetts, the sum of \$\_\_\_\_\_ (or a percentage or all of residuary estate) to be invested under the direction of the Trustees, the income only to be used for the College's general purposes.”

**Bequest for Endowment - Use of Income Restricted - (\$100,000 minimum)**

“I give to THE TRUSTEES OF MOUNT HOLYOKE COLLEGE in South Hadley, Massachusetts, the sum of \$\_\_\_\_\_ (or a percentage or all of residuary estate) to be invested under the direction of the Trustees, with preference that the income only be used . . . ”

---

<sup>1</sup> the corporate name of the College

(Financial Aid) “. . . to provide financial aid for students attending Mount Holyoke College. The conditions of awarding such aid shall be determined by the Trustees of the College."

(Faculty Compensation) ". . . for support of faculty compensation at Mount Holyoke College."

(Specific Academic Discipline) ". . . for support of the study of \_\_\_\_\_ (e.g. English, Economics, Mathematics, etc.) at Mount Holyoke College."

### **Bequest for an Endowed Memorial Fund - Use of Income Restricted - (\$100,000 minimum)**

"I give to THE TRUSTEES OF MOUNT HOLYOKE COLLEGE in South Hadley, Massachusetts, the sum of \$\_\_\_\_\_, (or a percentage or all of residuary estate) to be known as the "The Jane Doe Memorial Fund", the income to be used with preference for (insert here how donor wishes income to be used — for example, financial aid, faculty salaries, or instruction in a particular field.)

*Minimum amount for a named fund is currently \$100,000.*

### **Contingent Bequest for Mount Holyoke**

By naming Mount Holyoke as a contingent beneficiary, it is possible to make testamentary gifts to one or more individuals with the assurance that if any of the named individuals predecease the testator, the bequest will come to Mount Holyoke College. Suggested language for a contingent bequest follows:

"If any of the above-named beneficiaries should predecease me, I devise and bequeath to THE TRUSTEES OF MOUNT HOLYOKE COLLEGE in South Hadley, Massachusetts, all the property, real or personal, that said beneficiary or beneficiaries would have received had they survived me."

### **Codicil to Existing Will**

You can also make a gift to Mount Holyoke College by having your attorney draw a Codicil to your existing will using the legal language as given above.

### **Bequest to Establish Life Income Gifts to Benefit an Heir**

You can make a testamentary transfer of assets to a charitable trust which will provide lifetime income to your heirs. Your estate will receive a tax deduction for the value of the trust principal that ultimately will come to Mount Holyoke. If you are interested in this estate planning concept, please let us know. We will gladly provide specimen language for you to use in creating this type of trust by will.

The final authority on bequest language is your attorney and you should consult with her or him about proper wording. If you would like additional information about fund designation, please contact Julie Tyson, Director of Gift Planning, in the Development Office, at 800-642-4483.