



SACRAMENTO
STATE

California State University, Sacramento
University Advancement • Development Office
6000 J Street • Sacramento Hall 118 • Sacramento, CA 95819-6030
T (916) 278-6989 • F (916) 278-5709

Sample Bequest Language

The following sample language is provided as a general guide for you and your attorney. Bequests can take many forms, depending upon your own very personal goals:

- Unrestricted Gift: *A gift that can be used where the need is greatest*
- Gift for a Specific Purpose: *A gift that is to be used for a purpose you designate*
- Endowment Fund: *A gift that lasts in perpetuity*
- Residuary Bequest: *Leaves any remainder after all other bequests have been paid*
- Contingency Gift: *Takes effect only if a primary intention can't be met*

Sample Language:

"I give, devise and bequeath to California State University, Sacramento through The University Foundation at Sacramento State ("the Foundation"), a California non-profit public benefit corporation (tax identification number: 94-3001359), located at 6000 J Street, Sacramento, CA 95819-6030,

- | | |
|---|--|
| <input type="checkbox"/> the sum of \$_____; | <input type="checkbox"/> all the rest, residue and remainder of my |
| <input type="checkbox"/> _____ % of my estate; <i>or</i> | estate, both real and personal (after all |
| <input type="checkbox"/> _____ [describe | other bequests have been paid) |
| <i>the specific property you wish to give];</i> <i>or</i> | |

to establish or augment, if already established, the _____ Fund ("the Fund") for the benefit of the

- | | |
|--|--|
| <input type="checkbox"/> University; <i>or</i> | <input type="checkbox"/> _____ Unit; <i>or</i> |
| <input type="checkbox"/> College of _____; <i>or</i> | <input type="checkbox"/> _____ Program. |
| <input type="checkbox"/> _____ Department; <i>or</i> | |

The Fund, consistent with the investment and spending policies of the Foundation,

- [endowed fund option] shall be used as a permanent endowment, the distributions from which

shall be used

- [unrestricted "where the need is greatest" option] for its general purposes; *or*
- [specific purpose option] for _____ [describe the specific purpose, e.g. a scholarship, professorship, faculty development, research or academic program, if desired].

While unlikely, if at any time in the judgment of the Board of Directors of the Foundation, it is impossible or impracticable to carry out exactly this designated purpose, the Foundation shall determine an alternative purpose as near as possible to my designated intent."