

## ADVISOR'S GUIDE FOR PLANNED GIVING

### **Gifts from Wills and Trusts:**

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name Hamilton College in your will or trust please use the following suggested language:

### **Unrestricted Bequest —**

*"I give (a specific dollar amount/a specific asset, or percentage of the rest, residue, and remainder of my estate) to Hamilton College, the charitable, tax-exempt organization located in Clinton, New York, for its general purposes."*

### **Specific Bequest Language —**

*"I give (a specific dollar amount/a specific asset, or percentage of the rest, residue, and remainder of my estate) to Hamilton College, the charitable, tax-exempt organization located in Clinton, New York, to be used for the following purpose: (state the purpose)."*

NOTE: If you wish to restrict your bequest to a specific purpose or program at Hamilton College, please contact the Office of Gift Planning in advance to assure that the language you include will accomplish your wishes and align with the College's needs.

### **Endowment funds for a restricted purpose –**

If your bequest will be used to establish an endowment fund for a restricted purpose, we recommend that you and your counsel consider adding a "saving clause" to your bequest provision. A "saving clause" is a way to ensure the usefulness and relevance of your bequest in the future as the College's needs and priorities change.

*For example: "If, in the future, it is the opinion of the Board of Trustees at Hamilton College that all or part of the income of this fund cannot be usefully applied to such purpose, it may be used for any related purpose which, in the sole opinion of the Board of Trustees, will most nearly accomplish my wishes."*

### **Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:**

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to:

Ben Madonia  
Director of Gift Planning  
bmadonia@hamilton.edu  
(315) 859-4669  
198 College Hill Rd.  
Clinton, NY 13323

**Legal Name: Hamilton College**

**Tax I.D. Number:**

**Incorporated In: Clinton, NY**

### **Note to Attorneys, Accountants and other professional Advisors:**

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please contact Ben Madonia, Director of Gift Planning at (315) 859-4669 or bmadonia@hamilton.edu.