

PLANNING YOUR LEGACY GIFT TO HAMILTON

By naming Hamilton College in your Will, codicil, revocable living trust, or beneficiary designation form, you proclaim your confidence that the College will continue to prepare students for lives of meaning, purpose, and active citizenship.

The benefits of legacy gifts allow you to

- Make a commitment today to create a meaningful legacy.
- Retain control over your assets during your lifetime.
- Plan Hamilton's receipt of its legacy gift at the most opportune time for you, or you and your spouse/partner.
- Become a Joel Bristol Associate.

Planning Tips

- If you express your legacy gift as a percentage (e.g., "20 percent of the residue of my estate"), you can maintain the same relative gifts to charities and your heirs, regardless of changes in estate value.
- Please contact us to ensure that we understand your wishes and they align with Hamilton's needs before designating your legacy gift for a specific purpose.
- You may make your future legacy gift contingent upon other events.

SAMPLE ESTATE GIFT LANGUAGE

I give to the Trustees of Hamilton College, an educational corporation established by law at Clinton, New York, (here follows the amount in dollars, the percentage of the residuary estate, or an accurate description of the securities, real estate, or other property given), to be used for the general tax exempt purposes of the College.

Hamilton adds unrestricted legacy gifts to the Annual Fund or the general purpose endowment, depending on the amount. If you wish to direct your gift to an existing endowed fund or establish a new endowed fund, you could substitute "to [be added to/establish] the _____ Fund" in your Will, codicil, revocable living trust, or beneficiary designation form. The language in your estate planning document will govern how Hamilton can use your gift.

All suggested language should be reviewed and adapted by you and your counsel to your unique circumstances and the laws of the state in which you reside.