



Bequest Language

A bequest is a provision in your will or living trust that directs a portion of your estate to a named person or charity such as the University of Arizona Foundation. You may bequeath a specific asset, a dollar amount, a percentage of your estate or the remainder of your estate after all other gifts have been distributed.

You may choose how the funds from your bequest gift will be utilized by the University of Arizona. The following is suggested testamentary language depending on the type of gift you desire:

Unrestricted Gift

"... (specific assets, specific amount, remainder or percentage of estate) to the University of Arizona Foundation, an Arizona nonprofit corporation, Tucson, Arizona, to be used as determined by the University of Arizona Foundation Board of Directors."

Restricted Gift

"... (specific assets, specific amount, remainder or percentage of estate) to the University of Arizona Foundation, an Arizona nonprofit corporation, Tucson, Arizona, to benefit the _____ at the University of Arizona. These monies shall be used for _____."

Endowment Gift

"... (specific assets, specific amount, remainder or percentage of estate) to the University of Arizona Foundation, an Arizona nonprofit corporation, Tucson, Arizona, to establish the _____ Memorial Endowment Fund to benefit the _____ at the University of Arizona. Payouts declared from the endowment fund shall be used for _____. The endowment fund will be managed by the University of Arizona Foundation in accordance with their investment policies as established from time to time."

To ensure that your exact intentions are carried out, we strongly recommend that you consult with your attorney and a member of our planned giving staff when preparing your estate planning documents.