



[wm.planyourlegacy.org](http://wm.planyourlegacy.org)

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This brochure contains general gift, estate, and financial planning information for educational purposes. It does not provide legal or tax advice. For advice or assistance on specific gifts and decisions please consult an attorney or other professional advisor.

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Thank you for your interest in the important mission of William & Mary. Every gift is important to us and shows that you share our vision. If William & Mary is one of your most important charitable causes, you can make it part of your legacy. When you remember William & Mary in your will, you leave a lasting legacy to your values as you help continue our work far into the future.

## Why Should You Include a Charitable Gift in Your Will?

1. It's simple to do. It can be as easy as including language stating, "I give ten percent of the net value of my estate to William & Mary."
2. You can change your mind. We won't receive the gift until after your death. During your lifetime, you can amend anything you choose, i.e., beneficiaries, amounts, etc.
3. Tax-wise, it could be beneficial. Gifts to qualified charitable organizations reduce the value of your estate for estate tax purposes.
4. It's an easy way to support William & Mary, and we'd be grateful for your gift. Bequests of every size build our future financial strength.

How you include a gift in your will or revocable trust depends on what you want to accomplish, and what you want to give to William & Mary. Here are some options:

1. Give a percentage of your estate — e.g., "I give 25% of the net value of my estate as finally determined for federal estate tax purposes to William & Mary."
2. Give a percentage of the residue of your estate — the amount left after specific bequests have been given to individuals and organizations; e.g., "I give 25% of the rest, residue, and remainder of my estate to William & Mary."
3. Give a specific dollar amount or item of property; e.g., "I give William & Mary \$25,000" or "I give William & Mary 100 shares of IBM stock."

Besides choosing how your bequest will come to us, you also have a say in how it will be used and acknowledged here:

- Make the gift unrestricted — it will be used for the top priority need identified by the leadership of William & Mary;
- Make the gift restricted, i.e., to support a specific area of interest such as research, public programs, or education;
- Set up a named endowment fund, e.g., the Family Fund for Research;
- Memorialize or honor a loved one: “This gift is made in memory of my loving husband, a founder of William & Mary.”

The correct legal name of William & Mary is:

, a tax exempt organization located in Williamsburg, VA, 23187-8795.

If you are interested in more information about a gift through your will, please contact us.

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