



## SAMPLE BEQUEST LANGUAGE

Bucknell University gratefully accepts gifts for the benefit of the University, whether made outright, in trust, or by bequest. We encourage you to use the sample language provided below when you create a bequest for Bucknell. Also, while it is not required, we ask that you send us a copy of the portion of your will that names Bucknell as a beneficiary. This serves several purposes: To ensure that Bucknell will be able to use your bequest as you intend, to allow the University to plan its future with greater confidence and to welcome you to membership in the Ellen Clarke Bertrand Society—Bucknell’s gift recognition society for those who have a bequest planned for the University.

*The following are suggested forms for bequests that may be used by a testator or lawyer when writing a bequest for Bucknell:*

- **The Unrestricted Bequest:** “I give and bequeath to Bucknell University, a Pennsylvania corporation located at Lewisburg, Pennsylvania, the sum of \$ \_\_\_\_\_ /or/ \_\_\_\_\_ percent of my estate as an unrestricted gift.”
- **Bequest for General Endowment:** “I give and bequeath to Bucknell University, a Pennsylvania corporation located at Lewisburg, Pennsylvania, the sum of \$ \_\_\_\_\_ /or/ \_\_\_\_\_ percent of my estate, which sum shall be added to the general, unrestricted, permanent endowment fund of Bucknell University so that the income derived therefrom may be used for general university purposes.”
- **Bequest for a Specific Purpose:** “I give and bequeath to Bucknell University, a Pennsylvania corporation located at Lewisburg, Pennsylvania, the sum of \$ \_\_\_\_\_ /or/ \_\_\_\_\_ percent of my estate to be used at the discretion of the Trustees of Bucknell University for \_\_\_\_\_ or, in the event that such use shall in the judgment of the Trustees of Bucknell University become impracticable, then for such purpose as the Trustees of Bucknell University in their discretion shall determine.”
- **Bequest for Endowment of an Existing Scholarship/Endowed Fund:** “I give and bequeath to Bucknell University, a Pennsylvania corporation located at Lewisburg, Pennsylvania, the sum of \$ \_\_\_\_\_ /or/ \_\_\_\_\_ percent of my estate to build the permanent endowment of the \_\_\_\_\_ Scholarship/Fund, already established at Bucknell University.”
- **Bequest to Create a New Scholarship/Endowed Fund:** “I give and bequeath to Bucknell University, a Pennsylvania corporation located at Lewisburg, Pennsylvania, the sum of \$ \_\_\_\_\_ /or/ \_\_\_\_\_ percent of my estate to fund or build the

permanent endowment of the \_\_\_\_\_ Scholarship/Fund, to be governed by an agreement with Bucknell University, dated \_\_\_\_\_.”

- **Bequest Naming the University Residuary Beneficiary:** “I give and bequeath all the rest of my property, real and personal, to Bucknell University, a Pennsylvania corporation located at Lewisburg, Pennsylvania, to be applied to the general purposes of the University.”

If no such endowment/scholarship agreement exists for the fund, please contact the Office of Estate, Trust, and Gift Planning to prepare such an agreement in advance. This will guarantee that Bucknell can use the fund as you wish and ensure that the required endowment minimum will be met.