



ESTATE GIFTS IN SUPPORT OF BOSTON UNIVERSITY

A gift through your estate to Boston University is a wonderful way to leave a lasting legacy that will continue to strengthen the future of the University.

There are a variety of ways to make an estate gift to the University, including a gift of a specific dollar amount or a particular asset. Alternatively, you might wish to leave Boston University all or a certain percentage of the remainder of your estate after providing for family members and other beneficiaries. You may stipulate whether your gift is for the general support of the University, your school or college, a specific purpose or in honor or memory of another individual.

In addition to cash and securities, estate gifts to Boston University may include real estate, works of art, books, patent rights, or virtually anything of value.

EXAMPLE FORMS OF ESTATE GIFTS

Please note that these examples are general in nature and not intended to be legal advice. When making or revising your estate plans, we strongly encourage you to obtain the assistance of a lawyer. Members of Boston University's Planned Giving Office will be pleased to work with you and your lawyer to ensure that your charitable intentions are clearly stated and can be implemented by the University. This is especially important if you plan to establish an endowed fund with your gift.

For your reference, the EIN for Boston University is 04-210-3547.

Outright gift of specific property, personal property or percent of estate

"I give and devise [\$ _____], without reduction for any tax occasioned by my death, to Trustees of Boston University, a Massachusetts non-profit corporation having a principal place of business in Boston, Massachusetts, to be used or disposed of as the University (or School/College) in its sole discretion deems appropriate."

Gift of a share or residue of estate

"I devise and bequeath [(all) OR (_____ percent)] of the remainder of my property, without reduction for any tax occasioned by my death, to Trustees of

Boston University, a Massachusetts non-profit corporation having a principal place of business in Boston, Massachusetts, to be used or disposed of as the University(or School/College) in its sole discretion deems appropriate.”

Endowed Scholarship gift

“I give and devise [\$_____], without reduction for any tax occasioned by my death, to Trustees of Boston University, a Massachusetts non-profit corporation having a principal place of business in Boston, Massachusetts, to be used to establish or augment the [NAME OF FUND] Fund at the (School/College). The Fund shall be a permanently-endowed fund, the income of which will provide annual scholarship awards based on financial need to one or more deserving students enrolled in the (School/College), with a preference for _____. If there are no eligible students in any given year, then the scholarship may be awarded to students at the discretion of the Dean or his or her designee. If the estate gift is less than the minimum required to establish an endowed fund at the time the gift is received, the Fund shall be a current use fund with the same preferences as stated above.”

If your gift is for a specific purpose, members of Boston University’s Planned Giving Office will be pleased to work with you and your lawyer to draft language in order to accomplish your wishes.

THE CLAFLIN SOCIETY

Any provision you make for Boston University will qualify you for membership in the Claflin Society. Named for BU co-founder Lee Claflin, the Society recognizes and honors those alumni and friends who have provided for the future of Boston University through a variety of deferred gifts, including bequests. The Claflin Society numbers over 1,000 members and meets annually at special events. We would be honored to invite you to join.

Thank you for your interest in supporting the future of Boston University!

For more information, please call, write or email:

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