



Charitable Bequest

LEAVE A LEGACY

A charitable bequest can be a meaningful way to make a gift to Ohio University. Whether you choose to support students, faculty, or other areas of the University, the legacy you create will have a tremendous impact on future generations. When you choose to include Ohio University in your will or trust, you can indicate your wishes in one of several ways:

- You can leave a specific amount of money, often referred to as a specific bequest.
- You can leave a percentage of all the assets included in your estate at death, often referred to as a percentage bequest.
- You can leave a portion of the residual amount that is left in the estate after all specific bequests have been satisfied, which is often called a residuary bequest.

“Creating a bequest for Ohio University allowed me to express my commitment to Ohio University in a way that will have a significant impact on campus and future Bobcats. This experience was extremely meaningful to me because I know that my gift represents who I am and my love for Ohio University”

-Bill Hilyard '67

THE BENEFITS OF A BEQUEST

A bequest made through a will has the following benefits:

- **Estate Tax Reduction:** A charitable gift made through your will or trust may reduce estate taxes assessed at your death.
- **Revocability:** A charitable bequest is revocable, so you may make changes to the beneficiaries of your estate throughout your lifetime.
- **Flexibility:** This type of gift can be directed to any part of the University. If you ever wish to modify the specific designation, it is important to inform us that you have changed your plans, so that our records reflect your wishes.
- **Control:** When you include a charitable bequest in your estate plans, you have access to the assets during your lifetime, ensuring that the funds are there if you need to provide for unexpected occurrences.

SAMPLE BEQUEST LANGUAGE

Since our founding, The Ohio University Foundation has gratefully benefited from the thoughtful bequests via the wills or trusts of alumni, faculty, parents, and other friends. Below is suggested bequest language for use by donors and advisors.

For general unrestricted support university-wide:

"I give, devise, and bequeath to The Ohio University Foundation, a tax-exempt organization located at P.O. Box 869, Athens, OH 45701, (state percentage of estate, or residue or sum of money, or otherwise describe property) to support its general purposes."

For general support of a college or unit:

"I give, devise, and bequeath to The Ohio University Foundation, a tax-exempt organization located at P.O. Box 869, Athens, OH 45701, (state percentage of estate, or residue or sum of money, or otherwise describe property) to support (the name of the college, school, department, or unit.)"

To create a new endowment or add to an existing endowment:

"I give, devise, and bequeath to The Ohio University Foundation, a tax-exempt organization located at P.O. Box 869, Athens, OH 45701, (state percentage of estate, or residue or sum of money, or otherwise describe property) to endow (name of the specific endowment), to be administered under the terms of the Gift Agreements on file with The Office of Development."

To create a new restricted (non-endowed) account or add to an existing restricted account:

"I give, devise, and bequeath to The Ohio University Foundation, a tax-exempt organization located at P.O. Box 869, Athens, OH 45701, (state percentage of estate, or residue or sum of money, or otherwise describe property) to support (name of the specific restricted account), to be administered under the terms of the Gift Agreements on file with The Office of Development."

1804 SOCIETY

The 1804 Society, deriving its name from the founding date of Ohio University, was created to honor individuals and families who have documented or created a planned gift for The Ohio University Foundation. Membership is extended to donors who have made planned gifts of any amount.



Member benefits of the 1804 Society include:

- Certificate suitable for framing
- Lapel pin
- Exclusive invitations to campus and regional events
- Donor honor roll listing for those who desire to be included

The most important reward of being a member of the 1804 Society is the satisfaction of knowing that you have meaningfully contributed to the continued excellence of Ohio University and have made a powerful impact on students.

FOR MORE INFORMATION

To inquire about including Ohio University in your estate plans, please contact Ohio University Office of Gift Planning at (740) 593-0776.

We look forward to working with you and your advisors to help you meet your charitable and financial goals.