

THE FREDERICK W. BEINECKE 1909S AND EDWIN J. BEINECKE 1907 SOCIETY BEQUEST INTENTION

INCLUDING YALE SOM IN YOUR ESTATE PLAN

Bequests and other testamentary gifts by generous alumni and friends have been a significant source of financial support for the university for more than 300 years. The continuation and expansion of this tradition of remembrance will contribute to Yale SOM's future financial strength and continued academic excellence.

A gift to the university through your estate plan qualifies you as a member of Beinecke Society, created to recognize and thank donors whose foresight is building the future of Yale SOM.

You can make a specific gift to Yale SOM of cash, securities, real estate, or other property through your will, codicil, or trust instrument. You can also designate Yale SOM as the beneficiary of all or part of your estate or trust after the payment of estate-related expenses, other bequests, or following the death of a spouse or other primary beneficiaries. Another way to include Yale in your estate plan is to name Yale SOM as a beneficiary of your retirement plan or life insurance policy.

A bequest or trust provision for the benefit of Yale SOM may qualify your estate for an estate tax charitable deduction.

SAMPLE TESTAMENTARY LANGUAGE

"I give (_____ dollars) or (a specific asset, such as securities, real estate, or other property) or (all) or (_____ percent of the rest, residue, and remainder of my estate) to the Yale School of Management in New Haven, Connecticut (for its general purposes) or (for the following purpose: _____)."

While unrestricted gifts allow Yale SOM to allocate funds to areas of greatest need, you may designate your bequest for a particular purpose at Yale SOM. In order to ensure that the evolving educational needs of future generations of students are met, it is advisable to include the following language with restricted gifts:

In the event that at some future time due to changed circumstances, in the judgment of the Yale Corporation, it becomes impractical to apply my bequest to the designated purpose(s), the Yale Corporation shall make such modifications as will appropriately recognize my interests in coordination with university priorities.

If you wish to document your bequest intention at this time, please complete the form on the back of this sheet.

For more detailed information on including Yale SOM in your estate plan, please contact:

Kathleen Brown-Dorato
Director of Development & Planned Giving
+1 203-432-5463
kathleen.brown-dorato@yale.edu

Yale SOM Development Office
P.O. Box 208200
New Haven, Connecticut 06520-2800
som.yale.edu/plannedgiving

DOCUMENTING YOUR BEQUEST INTENTION

In order to support the educational mission of Yale University, I have included a non-contingent bequest to Yale SOM as part of my estate plan. A copy of the relevant provision of my will or trust is attached. If I make any change to this provision, I will notify the university of such change.

Name

Class/School Affiliation

Street, City, State, Zip

Home Telephone

Business Telephone

Current Value of Bequest

Date of Birth (for reunion gift recognition)

Signature

Date

Gift Recognition:

If you will be at least 65 years old as of June 30 of the current fiscal year, you may be eligible to receive gift recognition at a discounted value based on your age. However, if Yale will receive the non-contingent bequest upon the death of your spouse or another individual, gift recognition may be based upon his or her current age. Please provide the following information for that individual.

Name

Date of Birth

Please submit this form to:

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