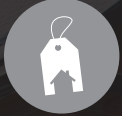




OSU FOUNDATION | OFFICE OF GIFT PLANNING
CHARITABLE BEQUEST



CHARITABLE BEQUEST - The Oklahoma State University Foundation is designated the beneficiary of your will, living trust or other estate plan document. Sample bequest language is available.

Our lives are comprised of millions of moments strung together. Decisions and mistakes; sleepless nights and jump-to-your feet celebrations; love, family, friends and laughter. When it's all said and done, what impact do we have on this world and our loved ones — the background and key players in our lives well lived? Was there a moment, a place, a person that directly shaped your life? Will you be able to do the same for someone else?

What kind of legacy will you leave? Could that legacy include transforming the future of OSU? A bequest is a great way to make a permanent and transformational impact on the people and organizations that mean the most to you. A bequest may also be an effective way to ease the burden of taxes on your family and your estate while leaving your stamp on Oklahoma State.

BENEFITS of a CHARITABLE BEQUEST

Written into a will or trust, a charitable bequest directs a gift to be transferred to OSU Foundation after you pass away. One benefit of a charitable bequest to OSU Foundation is that it enables you to make a lasting impact on a place critical to the development of your success as an adult — personally and professionally.

YOUR IMPACT

“ I owe OSU my wonderful life. Everything that I have done has been really satisfying. I don't know that there are a lot of things behind me that will cause people to say, 'This is what she did,' but I do have friends all over the world.”

Bobbie Nofflet

OSU Class of '48

A charitable bequest provides your estate a charitable deduction for the value of the gift, which means you spend less money on estate taxes.

AN EASY GIFT TO MAKE

Leaving a bequest is easy. Your advisor can help you include language in your will or trust for gifts to family, friends or a charity, such as the OSU Foundation, as part of your estate plan.

A Variety of Options

A bequest gift may be made in several different ways:

- A percentage of your estate.
- A specific asset.
- The residue of your estate.

Questions to Consider

A bequest can include additional details to ensure the gift is directed according to the wishes of the donor:

- Should the gift be restricted to a particular purpose?
- Is the gift meant to honor or memorialize someone?
- Can the gift be spent, or should it create an endowment for the perpetual income?

SAMPLE LANGUAGE *for*
CHARITABLE BEQUESTS

The following provides some suggested methods and wording for remembering Oklahoma State University in your will.

Specific

"I give, devise, and bequeath (insert asset description, percent of estate or dollar amount) to the Oklahoma State University Foundation, an Oklahoma not-for-profit corporation located in Stillwater, Oklahoma."

Residuary

"I give all (or insert percentage) of the remainder of my estate to the Oklahoma State University Foundation, an Oklahoma not-for-profit corporation organized and located in Stillwater, Oklahoma."

Contingent

"In the event (insert the primary beneficiary/beneficiaries) does/do not survive me, I give said amount to the Oklahoma State University Foundation, an Oklahoma not-for-profit corporation located in Stillwater, Oklahoma."

Learn more at OSUgiving.com/EstatePlanning

Connect with us:



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uniting donor and university passions and priorities to achieve excellence