



## BEQUEST INTENTION

### INCLUDING GEORGE MASON IN YOUR ESTATE PLANS

Legacy gifts represent sustainability for key academic and research programs as well as scholarship funds to help attract and retain students. These gifts provide benefits to future generations of Mason students--and to you and your heirs.

Being a member of the Legacy Society indicates that you believe in this proud heritage of innovation and excellence. The Society recognizes those donors who make qualifying gifts, such as bequests, trusts, and annuities, with a listing in a special section of the university's annual *Honor Roll of Donors*, copies of our newsletter, special event invitations, and more.

Mason's Legacy Society members have extraordinary foresight. To join, contact our planned giving staff today about your estate plans.

### MAKING A LEGACY GIFT

There are several ways to make a gift through your estate plans:

*(Please see adjacent page for sample bequest language)*

- You can make a gift of cash, securities, real estate, or other property directly to Mason.
- You can designate Mason a specific percentage of your estate.
- You can designate Mason as full or partial beneficiary to your retirement plan or life insurance policy.
- You can designate Mason as the beneficiary of all or part of the remainder of your estate or trust after the payment of estate related expenses and other bequests.
- You can establish a charitable gift annuity or charitable remainder trust with Mason.
- You can designate Mason as the full or partial beneficiary of an annuity or trust you have established.

If you wish to document your bequest intention at this time and become a member of the Legacy Society at George Mason University, **please complete the *Bequest Notification Form* and mail or fax it to our office.** For more detailed information on including Mason in your estate plans, please contact:

Director of Planned Giving  
Office of University Development & Alumni Affairs  
4400 University Drive, MS 1A3  
Fairfax, VA 22030  
Phone: 703-993-8850  
Fax: 703-993-8851  
development@gmu.edu  
supportingmason.gmu.edu



CONFIDENTIAL BEQUEST INTENTION FORM

NAME(S)\*: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

PHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

MASON ALUMNUS(A): Please list degree and graduation year: \_\_\_\_\_

In order to support the educational mission of George Mason University, my/our estate plan provides for the university as follows: (Please select all that apply)

- There is a bequest in my/our will or trust to benefit Mason. It includes:
- a specific dollar amount
- a percentage of my estate
- the residue of my estate

Mason is a/the beneficiary of my IRA or other retirement plan.

- Mason is the beneficiary of:
- a Charitable Gift Annuity
- a Charitable Remainder Trust
- Other

This gift is to be used for:

- Unrestricted (used where needed most)
- Specific college, department, program, or scholarship named here:

\_\_\_\_\_

\*Because estate planning is a highly personal manner, only those who give permission will have their names published in the annual Honor Roll of Donors as members of the Legacy Society.\*

I/We would like others to be encouraged by my/our example, I/we hereby give permission for my/our name(s) to be published.

I/We also would be interested in sharing my/our story with the Mason community.

I/We would like to remain anonymous and prefer that my/our name(s) not be published.

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_



## SAMPLE BEQUEST LANGUAGE

*I give, devise and bequeath to George Mason University Foundation, Inc.  
(Tax ID# 54-1603842):*

- *the sum of \_\_\_\_\_ dollars (\$\_\_\_\_\_ )*
- *or the following described property, to wit: \_\_\_\_\_*
- *or \_\_\_\_\_ percent ( %) of the rest, residue and remainder of my estate*

*(for its unrestricted use) or (to support the following) \_\_\_\_\_ (college, department,  
program, scholarship)*

*If at some time in the future, the objective of the bequest is no longer possible or practical of fulfillment, the University Board of Visitors, with counsel from the Foundation President and University President and the donor if a representative is living and able to act, shall determine the objective(s) for the funds and the use of any accumulated income thereon, that most closely resembles the purpose(s) set out in the estate plan.*