



UNIVERSITY OF LETHBRIDGE Wills and Bequests

The inclusion of the University of Lethbridge in your Will ensures the continuation of important education programs and cultural benefits provided by the University of Lethbridge.

By revealing that you have included the University of Lethbridge in your Will, you are making it possible for us to recognize your generosity now. (See attached Bequest Form.) All requests for anonymity will be respectfully honored.

Bequests may be stated as:

- a share/percentage of an estate
- the residue of an estate
- a specific dollar amount, or
- specific property.

Bequests should name the "University of Lethbridge" as the beneficiary. The following Will clauses are provided as examples only:

"I give, devise and bequeath to the University of Lethbridge (dollar amount or gift of property or portion of the residue) to be used in such manner as the Board of Governors may direct."

"I give, devise and bequeath to the University of Lethbridge (dollar amount or gift of property or portion of the residue) to be used for the purpose of _____.
(Student awards, priority needs for program or faculties, capital projects, equipment etc.)"

"I give, devise and bequeath to the University of Lethbridge (dollar amount or gift of property or portion of the residue) to be invested as the Board of Governors sees fit for the purpose of funding an endowed (scholarship, professorship or chair), which will be known as '(award, professorship or chair) in (faculty, department, or field of study).'"

After the above clause, the following wording is requested:

"Recognizing that at some time in the future it may be found that the income from the fund cannot be usefully applied for the expressed purpose, then the income and capital may be used for any other related purpose approved by the Board of Governors of the University of Lethbridge, within the general aims and objectives of the University of Lethbridge, and in keeping with the original wishes of the donor.

The receipt of the gift by the proper agent of the University of Lethbridge shall be sufficient discharge and, therefore, my Trustee shall be under no obligation to see that the trusts thereof are carried out.

Any matching grants obtainable as a result of this Bequest shall be used at the discretion of the Board of Governors of the University of Lethbridge to ensure or enhance the continuance of the fund for the purposes intended."

If you are considering a planned gift to the University of Lethbridge, we strongly encourage you to seek professional financial and legal advice that takes into account your personal circumstances. To ensure the Bequest may be fulfilled as intended, we suggest that you or your advisor consult with a University of Lethbridge official prior to finalizing the details of your gift arrangement by calling Kathy MacFarlane at the University Advancement office at 403-317-2838.



UNIVERSITY OF LETHBRIDGE Bequest Form

Please mail or fax your form to:
University Advancement – Planned Giving
PB103 – Penny Building
c/o 4401 University Drive
Lethbridge, Alberta
T1K 3M4

Name: _____

If Alumni, please list:

Former Surname: _____

Year/Program: _____

Address: _____

City: _____

Province: _____ Postal Code: _____

___ I/we have left a Bequest to the University of Lethbridge and wish to remain anonymous.

___ I/we have made a provision for the University of Lethbridge in my/our Will as follows:

- ___ Share/percentage of my/our estate
- ___ Residue of my/our estate
- ___ Specific dollar amount
- ___ Specific property

___ I/we have listed the University of Lethbridge as the beneficiary of a life insurance policy.

___ I/we have listed the University of Lethbridge as the beneficiary of retirement plan assets.

IF YOU WISH TO SHARE WITH US THE SIZE OR AMOUNT OF YOUR GIFT, YOU MAY DO SO HERE:

IF YOUR GIFT TO THE UNIVERSITY OF LETHBRIDGE IS FOR A SPECIFIC PURPOSE, PLEASE DESCRIBE ANY WISHES OR RESTRICTIONS IN THE SPACE BELOW OR IN AN ATTACHED DOCUMENT. (Attachments or letters that describe any provisions are encouraged. In particular, a copy of the section of your Will, Trust Agreement, or other document containing the provision is appreciated to ensure donor wishes are safeguarded.)

