



HOBART AND WILLIAM SMITH  
COLLEGES

Office of Advancement

## Planning Your Legacy Gift To The Colleges

By naming Hobart and William Smith Colleges in your will, codicil, revocable living trust, or beneficiary designation form, you proclaim your confidence that the Colleges will continue to prepare students to lead a life of consequence.

### The benefits of legacy gifts allow you to

- Make a commitment today to create a meaningful legacy.
- Retain control over your assets during your lifetime.
- Become a Wheeler Society Member.

### Planning Tips

- If you express your legacy gift as a percentage (e.g., “20 percent of the residue of my estate”), you can maintain the same relative gifts to charities and your heirs, regardless of changes in estate value.
- Please contact us to ensure that we understand your wishes and they align with the Colleges’ needs before designating your legacy gift for a specific purpose.
- You may make your future legacy gift contingent upon other events.

## Sample Estate Gift Language

*I/we give to Hobart and William Smith Colleges (Tax ID #16-0743040), located in Geneva, NY, the sum of \$\_\_\_\_\_, or \_\_\_\_\_% to be used for their general support (or for the support of a specific fund or program).*

All suggested language should be reviewed and adapted by you and your counsel to your unique circumstances and the laws of the state in which you reside.

**Federal Tax ID:** 16-0743040    **Legal Name:** Hobart and William Smith Colleges  
**Incorporated in:** Geneva, New York