



Office of Advancement

## Advisor's Guide for Planned Giving

### Gifts from Wills and Trusts:

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name Hobart and William Smith Colleges in your will or trust please use the following suggested language:

### Sample Bequest Language for a Will or Trust (Specific Gift):

*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 its general support (or for the support of a specific fund or program).*

For contingent, residual and other types of bequest language, please contact Angela Tallo '05.

**Federal Tax ID:** 16-0743040

**Legal Name:** Hobart and William Smith Colleges

**Incorporated in:** Geneva, New York

### Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:

Please contact your plan provider for a change of beneficiary form.

Once you have filled out the form, please send a copy to:

Angela Tallo '05

Director of Planned Giving and The Wheeler Society

Tallo@hws.edu

(315) 781-3545

300 Pulteney Street

Geneva, NY 14456

**Note to Attorneys, Accountants and other professional Advisors:** Thank you for helping your client with their charitable planning. If you have any questions or concerns, please contact Angela Tallo '05, Director of Planned Giving and The Wheeler Society at (315) 781-3545 or Tallo@hws.edu.



HOBART AND WILLIAM SMITH COLLEGES

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PREPARING STUDENTS TO LEAD LIVES OF CONSEQUENCE