



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 help to ensure that the Colleges will continue to prepare students to lead a life of consequence.

The benefits of a bequest allow you to

- Become a Wheeler Society Member.
- Make a commitment today to create a meaningful legacy.
- Retain control over your assets during your lifetime.
- Work with the Colleges to designate to or create a fund of your choosing.

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

Planning Tips

- If you express your 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.



HOBART AND WILLIAM SMITH COLLEGES

300 Pulteney Street, Geneva, NY 14456 | P (315) 781-3700 | F (315) 781-3767 | www.hws.edu

PREPARING STUDENTS TO LEAD LIVES OF CONSEQUENCE