



## **SAMPLE TESTAMENTARY LANGUAGE**

### How to include Lehigh University in your will

You may make a pecuniary or specific bequest of cash, securities or other property to Lehigh University by designating a specific dollar amount, a particular asset or a fixed percentage of your estate.

You may make a bequest of all or a portion of your residuary estate to Lehigh after you have provided for all other beneficiaries by specific bequests.

You may make Lehigh a contingent beneficiary of a trust that you establish in your will to provide income to one or more beneficiaries for life. Lehigh would then receive the principal of the trust at the death of the last surviving beneficiary. Such a trust arrangement may include any of the charitable life income plans outlined on [www.lehigh.edu/giftplanning](http://www.lehigh.edu/giftplanning) or a marital trust that pays all income to your spouse for his or her life.

### Sample testamentary language

#### A general bequest

“I give (a specific asset) or (\_\_\_\_% of the rest, residue and remainder of my estate) to Lehigh University, in Bethlehem, Pennsylvania, for its general use and purposes.”

#### A bequest for a specific purpose

“I give (\$\_\_\_\_) or (a specific asset) or (\_\_\_\_% of the rest, residue and remainder of my estate) to Lehigh University, in Bethlehem, Pennsylvania, to be used for the following purpose: (for example, to establish a scholarship fund or support an academic program).”

#### Statement of restrictions

If you wish to restrict your bequest provision in order to establish a fund for a specific purpose—such as an endowed scholarship fund—we ask that you include the following in your provision language:

“This fund is to establish an endowment fund to be known as (name of fund), the income from which to be used for (state purpose). If the Lehigh University Board of Trustees, in its sole judgment, determines that the original intent is no longer feasible, the university may use the income for such purposes as, in its sole judgment, will most nearly fulfill the original intent.”