

Sample Bequest and Trust Language

WISE — Worcester Institute for Senior Education, a program of Assumption University, Worcester, MA

General / Unrestricted Bequest

I give, devise, and bequeath [the sum of \$ _____ / _____ percent (___%) of my estate / all the rest, residue, and remainder of my estate] to Assumption University, a nonprofit corporation organized under the laws of the Commonwealth of Massachusetts, located at 500 Salisbury Street, Worcester, Massachusetts (Tax ID/EIN: 04-2105776), to be used to support the Worcester Institute for Senior Education (WISE), a program of Assumption University's School of Graduate and Professional Studies, for its general purposes as WISE's leadership deems appropriate.

Contingent Bequest

If [primary beneficiary name] does not survive me, I give, devise, and bequeath [amount/percentage] to Assumption University, a nonprofit corporation organized under the laws of the Commonwealth of Massachusetts, located at 500 Salisbury Street, Worcester, Massachusetts (Tax ID/EIN: 04-2105776), to support the Worcester Institute for Senior Education (WISE) program.

Trust Designation Clause

Upon the death of the Grantor, the Trustee shall distribute [\$ _____ / _____ percent (___%) of the trust estate] to Assumption University, a nonprofit corporation organized under the laws of the Commonwealth of Massachusetts, located at 500 Salisbury Street, Worcester, Massachusetts (Tax ID/EIN: 04-2105776), to support the Worcester Institute for Senior Education (WISE), a program of the University's School of Graduate and Professional Studies.

Notes

Assumption University is named as the legal beneficiary and 501(c)(3) entity, with WISE specified as the program to be supported, since WISE is part of Assumption University.

This is sample language for interested parties and their attorneys to adapt — not legal advice. Assumption University and WISE recommend that anyone using this sample language consult their own attorney or financial advisor before finalizing any estate document.