

# Sample Bequest Language

**LEAVING A GIFT TO OREGON STATE UNIVERSITY** through your will or living trust (referred to as a “bequest”) is an **easy and impactful way to benefit the university**. When making a bequest, you can choose to support your favorite college, program, or a specific purpose such as scholarships, fellowships, or faculty enrichment. The OSU Foundation is the independent fundraising agent of the university and is the preferred designee for estate gifts.

The sample language provided below illustrates how a bequest can be accomplished, and is intended to be used for educational purposes rather than as legal advice. We encourage donors to share this information with their legal counsel. We also recommend that you review your bequest with the OSU Foundation’s Gift Planning Office to ensure that your plans are carried out as you wish.



## Statement of Intent

The Statement of Intent is a short agreement between the donors and the Foundation/University, which includes background information provided by the donors and specifics on how the gift will be used. Donors may amend the Statement of Intent as often as they like without the necessity of amending their will or living trust.

### To establish a designated/restricted fund or gift use:

“I give:

\_\_\_\_\_ % of my estate,

OR

the sum of \$ \_\_\_\_\_,

OR

the real property described on the deed as \_\_\_\_\_,

OR

personal property described as \_\_\_\_\_,

OR

all the rest, residue, and remainder of my estate,

OR

\_\_\_\_\_ % of the rest, residue, and remainder of my estate to the Oregon State University Foundation to be used in accordance with the most recent Statement of Intent I have executed with Oregon State University Foundation. If no Statement of Intent exists at the time of my death, then I intend this gift to support \_\_\_\_\_ [*insert name of College/Program/Purpose*]. If no such college/program is in existence then to Oregon State University Foundation to further the purposes and objectives of Oregon State University as may be recommended by the President of the University and approved by the Trustees of the Foundation.”

*(Continued on reverse.)*



**For general or undesignated support of OSU or  
Specific college/program/fund:**

“I give:

\_\_\_\_\_ % of my estate,

OR

the sum of \$ \_\_\_\_\_,

OR

the real property described on the deed as \_\_\_\_\_,

OR

personal property described as \_\_\_\_\_,

OR

all the rest, residue, and remainder of my estate,

OR

\_\_\_\_\_ % of the rest, residue, and remainder of my estate  
to the Oregon State University Foundation to further the purposes and  
objectives of Oregon State University [or specify the College, or a School,  
Division or Department or Fund at OSU] as may be recommended by the  
President of the University and approved by the Trustees of the Foundation.”



**Beneficiary Designation**

When naming Oregon State University as a beneficiary of your retirement plan, IRA, life insurance policy, charitable trust, or charitable gift annuity, **please include our business name, Corvallis address, and Tax ID Number (93-6022772)** on your beneficiary designation form.

**JENNIFER MILBURN**

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**Believe it.**

The Campaign for  
Oregon State University