

# 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 Carleton College in your will or trust please use the following suggested language:

## **RESIDUAL GIFT LANGUAGE:**

A residual bequest comes to us after your estate expenses and specific bequests are paid:

*I give and devise to Carleton College (Tax ID number: 41-0694747), located in Northfield, Minnesota, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).*

## **SPECIFIC GIFT LANGUAGE:**

Naming Carleton College as a beneficiary of a specific amount from your estate is easy.

*I give and devise to Carleton College (Tax ID number: 41-0694747), located in Northfield, Minnesota, the sum of \$ \_\_\_\_\_ (or asset) to be used for its general support (or for the support of a specific fund or program).*

## **CONTINGENT GIFT LANGUAGE:**

Carleton College or its affiliates can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled.

*If (insert name) is not living at the time of my demise, I give and devise to Carleton College (Tax ID number: 41-0694747), located in Northfield, Minnesota, the sum of \$ \_\_\_\_\_ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).*

## **GIFTS OF APPRECIATED SECURITIES:**

Carleton's broker: UBS Financial Services

DTC #0221

Attn: Mark Bacigalupo

2200 UBS Plaza

444 Cedar Street

St. Paul, MN 55101

Carleton's account number: 7C20373

Carleton's Tax ID Number: 41-0694747

---

## **FOR MORE INFORMATION**

Lynne Wilmot '89

Director of Planned Giving

**Phone:** 507-222-4200 • **Email:** lwilmot@carleton.edu

**Mail:** One North College Street, Northfield, Minnesota, 55057

# Advisor's Guide for Planned Giving



## **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 Lynne Wilmot '89 Director of Planned Giving at [lwilmot@carleton.edu](mailto:lwilmot@carleton.edu)

Legal name: Carleton College

Tax ID number: 41-0694747

Address: One North College Street, Northfield, MN 55057

## **NOTE TO ATTORNEYS, ACCOUNTANTS AND OTHER PROFESSIONAL ADVISORS:**

Thank you for helping your client with their charitable planning. As a professional advisor, you build your client relationships on trust and mutual respect. The same is true for our relationships with our friends and donors.

We understand that financial, philanthropic and estate goals are unique to the individual. For this reason we welcome the opportunity to assist as you incorporate your clients' philanthropic objectives into well-crafted estate plans. Furthermore, we encourage prospective donors to consult with their professional advisors before making decisions based on information we provide.

If you have any questions or concerns, please call 800-492-2275 or 507-222-4200 or email [planned-giving@carleton.edu](mailto:planned-giving@carleton.edu).

---

## **FOR MORE INFORMATION**

Lynne Wilmot '89

Director of Planned Giving

**Phone:** 507-222-4200 • **Email:** [lwilmot@carleton.edu](mailto:lwilmot@carleton.edu)

**Mail:** One North College Street, Northfield, Minnesota, 55057