

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).

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 Gift Planning at lwilmot@carleton.edu

Legal name: Carleton College

Tax ID number: 41-0694747

Address: One North College Street, Northfield, MN 55057

FOR MORE INFORMATION

Lynne Wilmot '89

Director of Gift Planning

Phone: 507-222-2400 • **Email:** lwilmot@carleton.edu

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

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INSTRUCTIONS FOR MAKING A GIFT OF STOCK TO CARLETON COLLEGE

If you would like to make a gift to Carleton College using publicly traded stock currently held in a brokerage account, the easiest way to proceed is to instruct your broker to transfer the shares to Carleton's brokerage account. Your broker will probably require a written authorization from you before transferring the stock. If you are planning a gift of mutual fund shares, please contact Pam Sexton in Carleton's Gift Accounting office to obtain instructions for a gift of this nature. The information you will need to provide about Carleton's account is as follows:

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

Please ask that your broker include your name as the donor of the gift when transferring the stock. By letting the Carleton College know that the stock is being transferred, we can make sure that your gift will be processed and acknowledged promptly. The contact person at Carleton is:

Pam Sexton
Lead Gift Accountant
Telephone: 800-758-9441 or 507-222-5611
Fax: 507-222-7986
psexton@carleton.edu

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, please call 800-492-2275 or 507-222-4200 or email planned-giving@carleton.edu.

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