

Making a gift through a Will Provision ALLOWS YOU TO:

Carleton College

Create a meaningful legacy at Carleton

Reduce the size of your taxable estate

HOW YOU BENEFIT

- You make a commitment to Carleton today with little or no impact on your current cash flow.
- You retain control over your assets during your lifetime.
- Your provision can be structured to benefit Carleton after you die, or after both you and your spouse have died.

HOW CARLETON BENEFITS

After your death, Carleton will be able to use your gift—either as an addition to the endowment or for a purpose you specify.

PLANNING TIPS

- If you express your gift as a percentage (e.g., “20 percent of the residue of my estate”), you can maintain the same relative gifts to charities and your heirs, regardless of changes in estate value.
- If you are considering designating your gift for a specific purpose, such as a scholarship fund, or support for a specific department, contact us to ensure that we understand your wishes.
- You may need to provide the following information:
Legal name: Carleton College
Tax ID number: 41-0694747
Address: One North College Street, Northfield, MN 55057.

SAMPLE LANGUAGE

You may wish to share the following sample language with your attorney:

I give, devise, and bequeath to Carleton College, a non-profit Minnesota corporation, located at One North College Street, Northfield, Minnesota, the sum of \$_____ (or, _____ percent of my estate, or, _____ percent of the residue of my estate) to be used for such purposes as the Board of Trustees determines at the time this bequest becomes effective.

Using language like the following will help us follow the spirit of your gift, even if the particulars change:

If, at any time after this bequest becomes effective, the funds are not needed or cannot be used for this purpose, the Board of Trustees may direct the funds to be used for a purpose as closely related as possible to the original purpose described in this provision.

FOR MORE INFORMATION

Phone: 800-492-2275 or 507-222-4200

Email: planned-giving@carleton.edu • **Web:** giftplanning.carleton.edu

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

Disclosure: This information is not intended as legal advice. Please consult your attorney or financial adviser to learn if a charitable bequest is appropriate for your situation.

This gift qualifies you for membership in the

**JOSEPH LEE
HEYWOOD
SOCIETY**

Vicki Rupp '66

INCLUDING A GIFT FOR CARLETON IN HER WILL



“I wanted to give to an organization that will continue to do what it’s currently doing so well.”

VICKI RUPP '66

Sometimes, you have to leave a place like Carleton to appreciate it fully. At least that’s how it was for Vicki Rupp '66, who left Carleton to attend the University of Minnesota. “For many years now I’ve felt that was a poor decision,” she says.

Although she attended occasional reunions and contributed to the annual fund, Vicki really reconnected with Carleton in 2000, through an Alumni Adventures trip to China. She later served on the planning committee for the travel program. That service (and nearly 10 more alumni trips) have restored her Carleton experience, Vicki says. “What has meant more than anything to me is the bond between Carls from classes spanning decades. I always come home with more friends than I had when I left.”

Vicki, who lives in Kentfield, California, has generously included a bequest for Carleton in her will. She also has endowed a scholarship for students with demonstrated financial need, and her bequest will be added to that scholarship.

Vicki traveled frequently for her job as the vice president for global procurement for the Americas at American Express, so travel was the perfect way for her to reconnect with Carleton.

“My education has been very valuable to me,” Vicki says, “and I believe that a liberal arts education is important for people who will be citizens of the world.”