



A bequest to CU can be a specific amount, a percentage of your estate, or a portion of what is left after you have taken care of your family. To make a bequest, create a new will or living trust instrument, update an existing will with a codicil, or amend a current trust document.

## Specific or general bequest

A specific bequest is one where you give a fixed dollar amount, a specific asset or a percentage of your estate to the beneficiary. This could include cash, securities, real estate or personal property. Here is sample specific bequest language:

*"I give, devise and bequeath to the University of Colorado Foundation, a Colorado nonprofit corporation, (\$\_\_\_\_\_ or \_\_\_\_\_ %) for the benefit of (campus, specific school, program, project or purpose), to be used (choose one)*

- a** *at the discretion of the (department chair, dean of the school, chancellor of the campus or president of the university)." OR*
- b** *for the benefit of \_\_\_\_\_ (fund name or number) at the University of Colorado Foundation." OR*
- c** *in accordance with gift documentation on file with the University of Colorado Foundation."*

## Residuary bequest

With a residuary bequest you direct that all or part of the remainder of your estate be designated to the CU Foundation—after satisfaction of specific bequests, debts, taxes and expenses. Here is sample residuary bequest language:

*"All of the rest, residue and remainder of my estate I give, devise and bequeath to the University of Colorado Foundation, a Colorado nonprofit corporation, for the benefit of (campus, specific school, program, project or purpose), to be used (choose one)*

- a** *at the discretion of the (department chair, dean of the school, chancellor for the campus or president of the university)." OR*
- b** *for the benefit of \_\_\_\_\_ (fund name or number) at the University of Colorado Foundation." OR*
- c** *In accordance with gift documentation on file with the University of Colorado Foundation."*

## Contingent bequest

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A contingent bequest names the CU Foundation as the recipient of your estate only if another event happens. The most common situation is making a bequest contingent on another beneficiary not being alive when the estate is settled, or a beneficiary declining a bequest. Here is sample contingent bequest language:

*"In the event that my designated beneficiary is no longer living at the time of my death, I bequeath (\$, % or residuary) to the University of Colorado Foundation, a Colorado nonprofit corporation, for the benefit of (campus, specific school, program, project or purpose) to be used (choose one)*

- a** *at the discretion of the (department chair, dean of the school, chancellor for the campus or president of the university)." OR*
- b** *for the benefit of \_\_\_\_\_ (fund name or number) at the University of Colorado Foundation." OR*
- c** *in accordance with gift documentation on file with the University of Colorado Foundation."*

## Our Gratitude

CU takes pride in celebrating the carefully designed legacy you hope to one day provide. We recognize that the future is unknown and that your plans may one day change. Still, we welcome those who have informed CU of their gift as members of the University of Colorado Heritage Society. As a Heritage Society member, you'll join a prestigious group of supporters invited to engage with CU in unique and meaningful ways, including the annual CU Heritage Society Luncheon.

If you would like to further specify the use of your funds (including the creation of a permanently designated named endowment), we would like the opportunity to work with you on a formal agreement that will ensure your desires are honored when the gift comes to the University.

**Office of Gift Planning**  
**University of Colorado**  
**10901 W. 120th Ave., Suite 200 Broomfield, CO 80021**  
**303-541-1229**  
**giftplanning@cu.edu**

**CU Foundation Tax ID: #84-6049811**

The CU Foundation was founded in 1967 as a legally separate 501(c)(3) charitable organization to receive, manage and prudently invest private support for the benefit of the University of Colorado and support the University's philanthropic endeavors through donor stewardship.