

Advisor's Guide for Planned Giving



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. Please be touch if you have any questions or concerns.

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 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).

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Carleton

Gifts of Appreciated Securities:

Carleton's Broker: UBS Financial Services
DTC #0221
Attn: Shafer Block Wealth Management
2200 UBS Plaza
444 Cedar Street
St. Paul, MN 55101
800-444-0582

Carleton's Account Number: 7C20373

Carleton's Tax ID Number: 41-0694747

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 share a copy with the Planned Giving Office.

Legal name: Carleton College
Address: One North College Street, Northfield, MN 55057
Tax ID number: 41-0694747

QUESTIONS? PLEASE CONTACT US

Phone 800-492-2275 • 507-222-4200

Email planned-giving@carleton.edu

Mail Planned Giving, Carleton College, One North College Street, Northfield, MN 55057

Web giftplanning.carleton.edu