

Will Provision

Create a meaningful legacy at Carleton

Reduce the size of your taxable estate



Carleton

JOSEPH LEE
HEYWOOD
SOCIETY

QUALIFYING GIFT

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 your 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
Address: One North College Street
Northfield, MN 55057
Tax ID#: 41-0694747

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.

Online Resources

- Find details about will planning at:
go.carleton.edu/wizard and
go.carleton.edu/giftplan

QUESTIONS? PLEASE CONTACT US

Phone 800-492-2275 • 507-222-4200
Email planned-giving@carleton.edu
Web carleton.edu/giving/planned

One North College Street
Northfield, MN 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.

OUR STORIES OF IMPACT

Supporting Carleton through Will Provision

Marjorie Walter '85 and Tim Moran '83 want to make a substantial impact at Carleton.

Being able to bring their two dogs to the office is a definite perk for Marjorie Walter '85 and Tim Moran '83. That's just one reason—walking to the office from home is another—they love working at Kipling Law Group, a small Seattle firm that specializes in complex commercial litigation.

Tim is an attorney and Marjorie, a paralegal when she helped start the firm, is now reading for the bar under the tutelage of her boss.

"It's a unique way to become an attorney in Washington," she says. Marjorie has a PhD in art history from the University of California, Berkeley, but she and Tim decided a stable life "where we wanted to live" was more important than the uncertainty of a career bouncing around the country as an academic art historian.

The couple met at Carleton—Marjorie injured her ankle on the way to a party and Tim was "very chivalrous and kind" in helping her, she says—and married in 1989. Their experiences in large graduate school programs fostered in them an appreciation for the close personal interaction they had with professors and classmates at Carleton.

"Carleton's commitment to quality undergraduate teaching is very important to us," Tim says. The couple has included Carleton in their will in support of the College's commitment to a rich undergraduate experience. "We believe we can make a substantial impact at Carleton," Tim says.



“We had a rich experience at Carleton. We got a terrific education, both academically and socially. We want to support that experience for future students.”

MARJORIE WALTER '85

carleton.edu/giving/planned