



SAMPLE PROVISIONS FOR TESTAMENTARY GIFTS TO SALISBURY UNIVERSITY FOUNDATION, INC.

The provision in your will or revocable living trust providing for a gift to Salisbury University Foundation, Inc. should reflect your own unique circumstances and charitable objectives. We hope these samples will be helpful to you and your attorney.

UNRESTRICTED GIFT: “I give to Salisbury University Foundation, Inc. in Salisbury, MD, [the sum of ____ dollars.] *or* [an amount equal to _____percent (_____%) of the residue of my estate.] *or* [*a specific asset, such as securities, real estate or other property.*.]”

GIFT FOR A SPECIFIC PURPOSE: “I give to Salisbury University Foundation, Inc., Salisbury, MD, [the sum of ____ dollars] *or* [an amount equal to _____ percent (_____%) of the residue of my estate] *or* [*a specific asset, such as securities, real estate or other property*] for the following purpose: [*a specific purpose, such as providing for financial aid to students or supporting a particular school or program of the University*]. If at any time in the judgment of the SU Foundation it is impossible or impracticable to carry out the purpose I have designated, the SU Foundation shall determine an alternative purpose as near as possible to the designated purpose.”

GIFTS FROM INVESTMENT ACCOUNTS, RETIREMENT ACCOUNTS, OR LIFE INSURANCE POLICIES

You may choose to designate Salisbury University Foundation, Inc. as beneficiary of all or part of your investment account, retirement account, or life insurance policy.

The beneficiary designation form may ask for SU Foundation's tax identification number. That number is 52-1127396.

FOR ADDITIONAL INFORMATION OR ASSISTANCE, PLEASE CONTACT: Matthew Heim,
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