

Advisor's Guide for Planned Giving

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 Metropolitan State University of Denver Foundation, Inc. in a will or trust please use the following suggested language:

Residual Bequest Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give, bequeath and devise all (or ____ percent) of the rest, residue and remainder of my estate to Metropolitan State University of Denver Foundation, Inc. (Tax ID #84-0576459), a corporation of the State of Colorado, located in Denver, CO, for the general and educational purposes of said Corporation.

Specific Bequest Language

You can also name MSU Denver as a beneficiary of a specific amount from your estate:

I give, bequeath, and devise to Metropolitan State University of Denver Foundation, Inc. (Tax ID #84-0576459), a corporation of the State of Colorado, located in Denver, CO, the sum of \$_____, (or, ____ percent of the rest, residue and remainder of my estate) to be used to support _____ (name of program or academic area.) In the event the need to support _____ no longer exists, The Board of Trustees shall be and hereby are authorized to use this bequest for a purpose in keeping with the spirit of this gift in the best interest of the College.

Contingent Bequest Language

MSU Denver 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 Metropolitan State University of Denver Foundation, Inc. (Tax ID #84-0576459), a corporation located in Denver, CO, 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).

Gifts of Appreciated Securities:

Legal Name: Metropolitan State University of Denver Foundation, Inc.

Tax I.D. Number: 84-0576459

DTC Number: 8275

Account #: 10180008570

Incorporated in: Denver, CO

Please contact us for a stock transfer form.

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 send a copy to Kyle Backlund, Associate Director of Planned Giving.

For Gifts of Securities, please contact the Office of Gift Planning for transfer instructions.

Note to Attorneys, Accountants and other Professional Advisors

Thank you for helping your client with their charitable planning. The Office of Gift Planning is available to discuss with you or your client, their charitable intentions to help ensure the gift makes the desired impact. If you need information or if you have any questions or concerns, please contact Kyle Backlund, at 303-615-2040 or backlund@msudenver.edu.