

# 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, 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 the Board of Trustees of Metropolitan State University of Denver, Inc., 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 the Board of Trustees of Metropolitan State University of Denver, Inc., 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 the Board of Trustees of Metropolitan State University of Denver, Inc. (Tax ID #84-0576459), 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, 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 Traci McBee Rowe, Director of Donor Relations.

For Gifts of Securities, please contact University Advancement for transfer instructions.

**Note to Attorneys, Accountants and other Professional Advisors**

Thank you for helping your client with their charitable planning. University Advancement 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 Traci McBee Rowe, at 303-615-2046 or [tmcbeero@msudenver.edu](mailto:tmcbeero@msudenver.edu).