

## A BEQUEST IS A SIMPLE, BUT IMPORTANT LIVING LEGACY

*Clemson University is the direct result of the vision and legacy of Anna Calhoun Clemson and Thomas Green Clemson. When he signed his will on Nov. 6, 1886, the Clemsons' long-awaited vision for establishing a "high seminary of learning" was created. It was also a true testament to the power of planned giving. The Clemsons and others like them had a strong desire to utilize their assets in a way that reflected their own personal values. You have that ability as well.*

### A BEQUEST REFLECTS WHAT'S MOST IMPORTANT TO YOU

Most of us can point to someone or something that has made a positive impact on our education and life. It might be a faculty member, a scholarship that meant the difference in receiving a college education, or simply a program of study that inspired your career. Regardless, many people choose to acknowledge these people, programs and institutions they feel contributed to their personal and professional success through bequests to Clemson University.

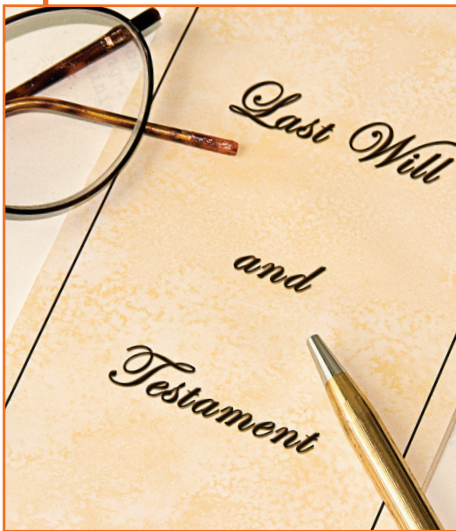
Who or what has influenced the direction of your life? Have you considered how your bequest could also influence the future of someone just like yourself?

Simply, a bequest provides you the opportunity to invest in Clemson's future by giving unrestricted support to the University or a specific area of interest. By making an unrestricted bequest, you support and trust the vision of Clemson leadership as it works to strengthen and maintain the facilities, operations and resources it needs to support the purpose of its founding.

A bequest may be expressed as a direct gift of cash, a percentage of your estate, securities, real estate and more. Besides the personal satisfaction of making a bequest, there are definite tax benefits, some of which include a federal estate-tax deduction for the full value of the gift. A bequest is as simple as picking up your pen and naming Clemson as a designated beneficiary of a specific asset. And, if future circumstances prevent you from fulfilling your bequest, you can dissolve your bequest easily.

### AN ENDOWED BEQUEST SUPPORTS A SPECIFIC PROGRAM

A bequest can also be given to establish an endowment. An endowed bequest or fund is one that cannot be exhausted and is preserved in perpetuity, supplying a constant source of financial support for the excellence of the University in areas such as academics, research, public service, athletic endeavors and more. Funds may be established to honor or in memory of individuals. This particular type of bequest allows you to echo your legacy as income is awarded to deserving students and faculty or applied to crucial programs on an annual basis. Can you think of a better way to leave your legacy or honor the life of someone you love?



## THERE'S NO TIME LIKE THE PRESENT

We would be honored to provide you the information you need to make a bequest. A staff member is available to meet with you and your financial and legal advisers if needed. To learn more about the Clemson Legacy Society program visit [clemsongiving.org](http://clemsongiving.org) or call 864-656-0663. We are equipped to discuss various ways for you to give to Clemson that satisfy your personal financial objectives and support the life-changing educational experience for Clemson students today, tomorrow and forever.

## A GUIDE TO LANGUAGE USED IN MAKING A BEQUEST

*State whether your gift is a fixed sum, a specific asset (such as shares of stock) or calculated from the remainder of your estate:*

"I give, devise and bequeath to the Clemson University Foundation, a nonprofit corporation organized in accordance with the laws of the State of South Carolina for the purpose of supporting Clemson University, an educational institution, located at Clemson, South Carolina" (choose from a, b, or c below)

- a) the sum of \$ \_\_\_\_\_.
- b) the following described property \_\_\_\_\_.
- c) \_\_\_\_% of the rest, residue and remainder of my estate.

*Select the language below that most closely matches your wishes for how your gift will be used:*

The property comprising this gift may, for investment purposes, be merged with any of the general investment assets of the Clemson University Foundation, but the gift shall be entered in the Foundation's books and recorded as the \_\_\_\_\_ (ex. John and Jane Doe Family Endowment/Fund), and shall always be so designated.

The distributions from the fund shall be used for: \_\_\_\_\_

### a) Unrestricted Bequest/Current Operations

"This gift is to be used for the benefit of Clemson University to support current operations as it deems advisable with no restrictions."

### b) Restricted Bequest\*\*

"This gift is to be used by (College/Dept./Program) \_\_\_\_\_ for the following purpose: \_\_\_\_\_."

*(If a contribution is to be restricted, it is recommended that the intended provision be reviewed with University officials to be certain that your wishes may be carried out.)*

### c) Unrestricted Endowment

"This gift is to be used for the benefit of Clemson University to add to its permanent endowment. Income generated from this fund shall be expended for the benefit of Clemson University to support scholarships and current operations as it deems advisable with no restrictions."

### d) Named Endowed Scholarship, Fellowship or Program:\*\*

"This gift is to be used for the purpose of creating the \_\_\_\_\_."

*(List endowment name and choice of endowed scholarship, fellowship or program area.)*

*If you select a specific purpose for your gift, inclusion of the following sentence will ensure that the bequest remains useful through many decades.*

"If at the time this bequest is received by the Clemson University Foundation, or at any time thereafter, the Clemson University Foundation Board of Directors determines that all or part of said income of the fund can no longer be utilized to the best advantage for the purpose designated herein, then all or any part of the annual income may be used for such other institutional purpose which, in the sole discretion of Clemson University Foundation Board of Directors, shall most closely carry out my original intent."

## TO AMEND A WILL

If you have an up-to-date will but have not included Clemson, a simple and inexpensive codicil can be prepared and attached to your will without disturbing any existing arrangements. A codicil merely adds or amends an existing will.

\*\*Please be advised fund minimum may apply.

This information is not intended to provide legal or accounting advice, or to address specific situations. Please consult with your legal or tax adviser.



ClemsonForward will position Clemson for the next 50 years and make an impact on real issues facing the people of our state and nation. Clemson Forever supports the goals of ClemsonForward through its unrelenting mission to strengthen the University by building a solid financial base of private giving, providing exemplary stewardship of those gifts and clearly communicating to donors the impact of their gift and the gratitude of the Clemson Family.

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