



2900 North Menomonee
River Parkway
Milwaukee, Wisconsin
53222-4597
www.mtmary.edu

414-258-4810

SUGGESTED BEQUEST LANGUAGE

Establishing scholarships through a bequest

Scholarships may be established through bequests. You may wish to meet with your attorney and accountant, along with the Mount Mary College Development Staff, to prepare a "Memo of Intent" to name the criteria that will govern your scholarship upon death.

Specific amount for unrestricted purposes

I give, devise, and bequeath to Mount Mary College, a not-for-profit organization located at 2900 N. Menomonee River Parkway, Milwaukee, WI 53222, the sum of \$_____ in cash or in-kind (or _____ shares of _____ stock) to be used at the discretion of the Board of Trustees of Mount Mary College for the general purposes of Mount Mary College and its related entities.

If changed circumstances should at some future time make it impractical to continue using the income from the fund for the purposes designated, then Mount Mary College Board of Trustees may redesignate the purpose for which the fund income may be distributed, provided that the _____ Fund shall continue to bear the name _____ and that the amended terms shall adhere as closely as possible to my original intent.

Specific amount for specific purposes

I give, devise, and bequeath to Mount Mary College, , a not-for-profit organization located at 2900 N. Menomonee River Parkway, Milwaukee, WI 53222, the sum of \$_____ in cash or in-kind (or _____ shares of _____ stock) to be used for _____ at Mount Mary College.

If changed circumstances should at some future time make it impractical to continue using the income from the fund for the purposes designated, then Mount Mary College Board of Trustees may redesignate the purpose for which the fund income may be distributed, provided that the _____ Fund shall continues to bear the name _____ and that the amended terms shall adhere as closely as possible to my original intent.

Percentage of estate for unrestricted purposes

I give, devise, and bequeath to Mount Mary College, a not-for-profit organization located at 2900 N. Menomonee River Parkway, Milwaukee, WI 53222, _____ percent (%) of the rest, residue, and remainder of my estate as an unrestricted gift to be used at the discretion of the Board of Trustees of Mount Mary College for the general purposes of Mount Mary College, Milwaukee, Wisconsin.

If changed circumstances should at some future time make it impractical to continue using the income from the fund for the purposes designated, then Mount Mary College Board of Trustees may redesignate

the purpose for which the fund income may be distributed, provided that the _____ Fund shall continue to bear the name _____ and that the amended terms shall adhere as closely as possible to my original intent.

Percentage of estate for specific purposes with an endowment provision

I give, devise, and bequeath to Mount Mary College, a not-for-profit organization located at 2900 N. Menomonee River Parkway, Milwaukee, WI 53222, _____ percent (%) of the rest, residue, and remainder of my estate to establish the _____ Fund. The principle of this fund shall be invested as part of the Mount Mary College permanent endowment and in accordance with its policies. The income therefore is to be used by Mount Mary College located in Milwaukee, Wisconsin, as a _____. Contributions may be added to the fund at any time. (Fill in as greatest need, scholarship, or maintenance)

If changed circumstances should at some future time make it impractical to continue using the income from the fund for the purposes designated, then Mount Mary College Board of Trustees may redesignate the purpose for which the fund income may be distributed, provided that the _____ Fund shall continue to bear the name _____ and that the amended terms shall adhere as closely as possible to my original intent.

For more information:

Development Office
2900 N. Menomonee River Parkway
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(414) 443-3638
dev@mtmary.edu
www.mtmary.edu/give.htm