



## 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 College of the Holy Cross in a will or trust please use the following suggested language:

#### Unrestricted Gift:

*I give, devise, and bequeath to the TRUSTEES OF THE COLLEGE OF THE HOLY CROSS, a nonprofit corporation existing under the laws of the Commonwealth of Massachusetts located in Worcester, Massachusetts, Tax Identification Number 04-2103558 (hereinafter, the College), the sum of \$\_\_\_\_\_ (or, \_\_\_ percent of my residuary estate) to be used at the discretion of the College for its general purposes.*

#### Restricted Gift:

*I give, devise, and bequeath to the TRUSTEES OF THE COLLEGE OF THE HOLY CROSS, a nonprofit corporation existing under the laws of the Commonwealth of Massachusetts located in Worcester, Massachusetts, Tax Identification Number 04-2103558 (hereinafter, the College), the sum of \$\_\_\_\_\_ (or, \_\_\_ percent of my residuary estate) to be used for [state the specific fund or purpose, e.g., financial aid, athletics, faculty resources].*

#### Restricted Gift with Endowment Provision:

*I give, devise, and bequeath to the TRUSTEES OF THE COLLEGE OF THE HOLY CROSS, a nonprofit corporation existing under the laws of the Commonwealth of Massachusetts located in Worcester, Massachusetts, Tax Identification Number 04-2103558 (hereinafter, Holy Cross or the College) \_\_\_\_\_ percent of the rest, residue and remainder of my estate to establish the \_\_\_\_\_ ENDOWED FUND. The principal of this fund shall be invested as part of Holy Cross’s permanent endowment and in accordance with its policies. The income therefrom is to be used by Holy Cross for \_\_\_\_\_.*  
*Contributions may be added to the fund at any time.*

### Gifts of Appreciated Securities:

Legal Name: College of the Holy Cross  
Tax I.D. Number: 04-2103558  
DTC Number: 0443  
Account #: N7M002176  
Incorporated in: Worcester, MA

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 Office of Gift Planning, College of the Holy Cross.

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 Office of Gift Planning, at 508-793-3481 or [forothersforever@holycross.edu](mailto:forothersforever@holycross.edu).