



**CALIFORNIA STATE UNIVERSITY
SAN BERNARDINO**

5500 University Parkway, San Bernardino, CA 92407-2397

UNIVERSITY ADVANCEMENT
Gift and Estate Planning

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Wills and Bequest Language

You can make a difference in the lives that follow by including a bequest to the CSUSB Foundation in your Will or estate plan. A legacy gift is a wonderful way to remember someone who has made a difference in your life. You can arrange for a gift in several ways, the most common being through a Will.

Many of our friends set aside a certain percentage or dollar amount of their estate to go to the CSUSB Foundation after they have provided for their family. Others leave life insurance, IRAs or other assets. We would be happy to discuss how an estate gift (also called a planned gift) may benefit you and the University.

Suggested Wording for Bequests

Sample language to use:

“I hereby give ___% (or \$ amount or specific assets) from my estate to the
Foundation for California State University San Bernardino
5500 University Parkway, San Bernardino, CA 92407
to be used for its charitable purposes.”

OR to make a bequest for a particular purpose:

“I hereby give ___% (or \$ amount or specific assets) from my estate to the
Foundation for California State University San Bernardino
5500 University Parkway, San Bernardino, CA 92407
to be used for “scholarships, the College of _____, or other purpose, etc. etc.”

We recommend that you work with the Office of Gift and Estate Planning to ensure that your exact intention can be carried out by CSUSB. We will work with you and your advisors to draft the language that will accomplish your charitable goals.

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If you already have a Will and it does not yet include a charitable bequest, your estate planning attorney can help you amend it by drafting a legal document called a “codicil” or for a Trust it’s called an “amendment”. It is not necessary to write an entirely new Will or Trust.

Remember that you may also include CSUSB as a remainder beneficiary of a life insurance policy, IRA or other type of retirement plan.

Contact the Office of Gift and Estate Planning for additional information or assistance at 909/537-3521.

The California State University

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