

# UVM IN YOUR ESTATE PLANS

Ensure Your Legacy for Generations



The University of Vermont  
**FOUNDATION**





**Thank you for considering  
UVM in your estate plans.**

**Your charitable planning will  
amplify UVM's future and will allow  
UVM to convey gratitude to you today.**

# YOUR LEGACY AT UVM

- You will **craft a legacy meaningful to you**
- You will **ensure your charitable intentions** are clear to UVM and your heirs
- You will **help UVM's financial future**
- You can **create perpetual funding** by establishing or adding to an endowment
- You will **inspire other donors**
- Your **generosity will be celebrated** for the lasting impact you are making at UVM



# IMPACT ANY PART OF CAMPUS

- **Ensure affordability and access to a high-quality education**
- **Expand teaching, research and public service**
- **Enhance UVM's land grant mission**
- **Enrich the student experience and campus life**



# GIVE FROM ANY PART OF YOUR ESTATE

**Will**

**Retirement  
Accounts**

**Annuities**

**Revocable Living Trust**

**Donor-Advised Funds**

**Investment  
Accounts**

**Charitable Remainder Trust**

**Life Insurance**

**IRA**



# DEFINING YOUR PURPOSE IS EASY

## Allow UVM to Choose the Purpose

Your estate documents say "... to UVM Foundation"

Email to UVM Foundation states "In my estate plans, I have a provision naming UVM Foundation as a beneficiary of \$\_\_\_\_\_."

## Add to an Existing Endowment / Fund

Your estate documents say "... to UVM Foundation for \_\_\_\_\_ endowment [or fund]."

Email to UVM Foundation states "In my estate plans, I have a provision naming UVM Foundation as a beneficiary of \$\_\_\_\_\_ for \_\_\_\_\_ endowment [or fund]."

## Create a New Endowment / Fund

Your estate documents say "... to UVM Foundation for \_\_\_\_\_ endowment [or fund]."

Agreement at UVM Foundation defines your purpose, criteria, and endowment or current use fund, as well as estimates your estate gift.

# ALLOW UVM TO CHOOSE THE PURPOSE

You give UVM the most flexibility for its needs at the time of the distribution from the estate or trust.

Your estate documents are simple:

- Name UVM Foundation as the beneficiary.
- Specify dollar amount or % of the remainder of the estate or trust.
- No other purposes or restrictions.

Your commitment can be shared with UVM Foundation in an email exchange or on a form.

While requested, you do not need to share your estate or trust documents.



# ALLOW UVM TO CHOOSE THE PURPOSE

## **Sample Provision for Your Estate:**

I give and bequeath \$\_\_\_\_\_ to the University of Vermont and State Agricultural College Foundation, Inc. ("UVM Foundation"), a nonprofit corporation located in Burlington, Vermont.

## **Sample Email to UVM Foundation:**

In my estate plans, I have included a provision naming UVM Foundation as a beneficiary of an estimated \$\_\_\_\_\_ to support UVM's highest priorities.

# ADD TO AN EXISTING ENDOWMENT / FUND

You can support an existing endowment or current use fund at UVM Foundation, created by you, by another donor, or by UVM.

Your estate documents are simple:

- Name UVM Foundation as the beneficiary.
- Specify dollar amount or % of the remainder of the estate or trust.
- Specify the endowment / fund or state your purpose is on file.

Your commitment can be shared with UVM Foundation in an email exchange or on a form.

While requested, you do not need to share your estate or trust documents.

# ADD TO AN EXISTING ENDOWMENT / FUND

## Sample Provision for Your Estate to add to an Existing Endowment / Fund:

I give and bequeath \$\_\_\_\_\_ to the University of Vermont and State Agricultural College Foundation, Inc. ("UVM Foundation"), a nonprofit corporation located in Burlington, Vermont, for the \_\_\_\_\_ endowment / fund.

## Sample Email to UVM Foundation:

In my estate plans, I have included a provision naming UVM Foundation as a beneficiary of an estimated \$\_\_\_\_\_ for the \_\_\_\_\_ endowment / fund.

# CREATE A NEW ENDOWMENT / FUND

Your plans for a new endowment or current use fund are defined in an agreement with UVM Foundation.

Your estate documents are simple:

- Name UVM Foundation as the beneficiary.
- Specify dollar amount or % of the remainder of the estate or trust.
- State your purpose is defined in a separate agreement.

You can alter the purpose with UVM Foundation, without needing to change your estate or trust.

Sharing your estate or trust documents is optional.

You can start the endowment / fund during your lifetime.

# CREATE A NEW ENDOWMENT / FUND

## **Sample Provision for Your Estate to Create a New Endowment or Current Use Fund with UVM Foundation:**

I give and bequeath \$\_\_\_\_\_ to the University of Vermont and State Agricultural College Foundation, Inc. ("UVM Foundation"), a nonprofit corporation located in Burlington, Vermont, for purposes as agreed between me and UVM Foundation.

## **Agreement with UVM Foundation:**

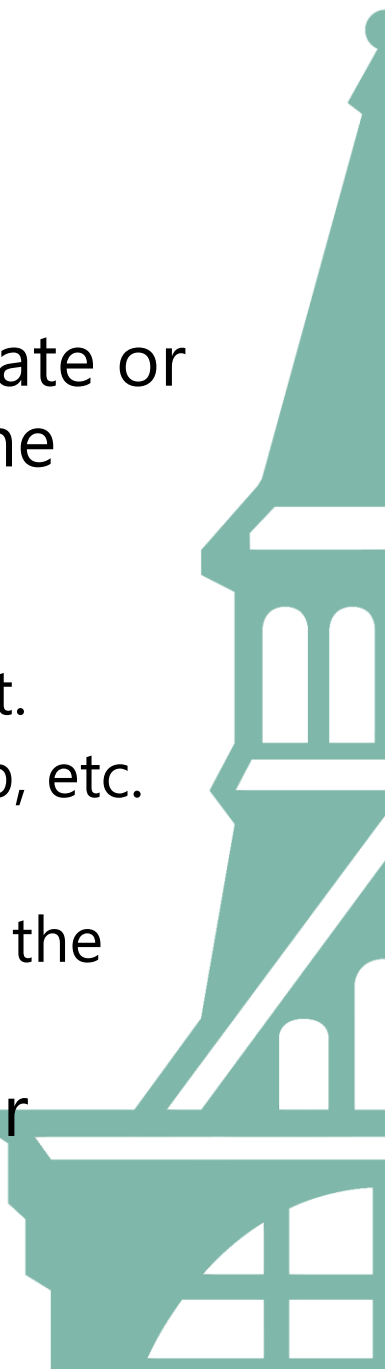
All of your intentions, purposes, criteria and estimated bequest will be formalized in an agreement with UVM Foundation that you can amend during your lifetime.

# CUSTOMIZED PURPOSE IN YOUR ESTATE

While uncommon, you can define a new purpose in your estate or trust documents, which you can write on your own or with the help of UVM Foundation:

- Name UVM Foundation as the beneficiary.
- Specify dollar amount or % of the remainder of the estate or trust.
- Specify the purpose, including name of scholarship, professorship, etc.
- Specify endowment or current-use.
- Include a contingency clause, to permit UVM to make changes in the future if your purpose can no longer be carried out.

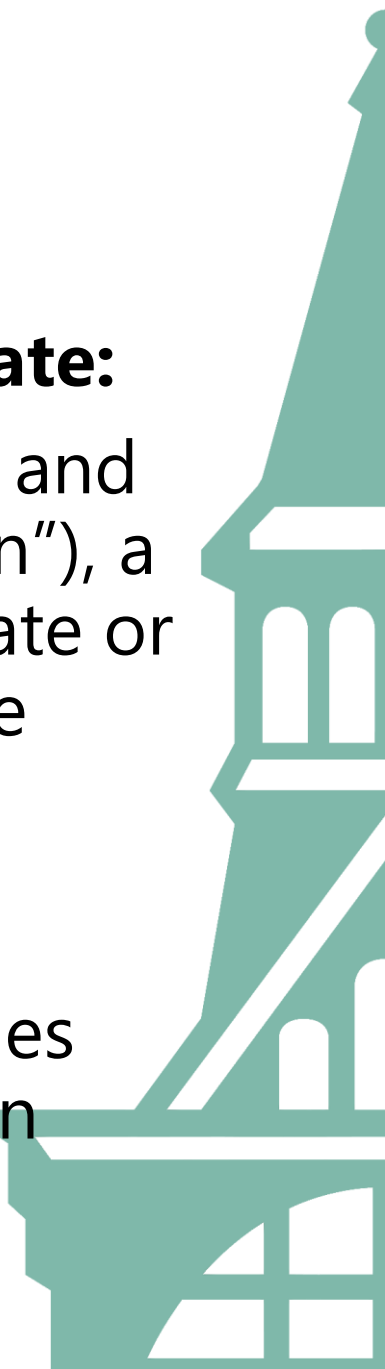
Please contact UVM Foundation to discuss how to share your estate plans if customized.



# CUSTOMIZED PURPOSE IN YOUR ESTATE

## **Sample Provision for an Endowment Defined in Your Estate:**

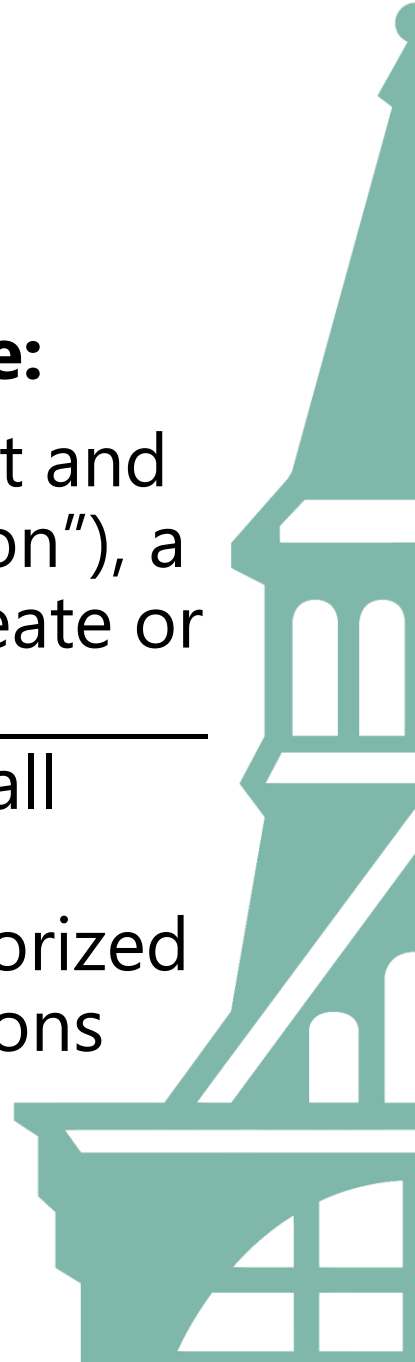
I give and bequeath \$\_\_\_\_\_ to the University of Vermont and State Agricultural College Foundation, Inc. ("UVM Foundation"), a nonprofit corporation located in Burlington, Vermont, to create or add to an endowment called the \_\_\_\_\_ where the income therefrom shall be used for \_\_\_\_\_ at the University of Vermont. If any part of this provision shall become unlawful, impracticable, impossible to achieve or wasteful, then UVM Foundation's Board of Directors is authorized to make changes it deems appropriate based on my intentions and the mission of UVM Foundation.



# CUSTOMIZED PURPOSE IN YOUR ESTATE

## Sample Provision for Current-Use Defined in Your Estate:

I give and bequeath \$\_\_\_\_\_ to the University of Vermont and State Agricultural College Foundation, Inc. ("UVM Foundation"), a nonprofit corporation located in Burlington, Vermont, to create or add to a fund called the \_\_\_\_\_ that shall be used for \_\_\_\_\_ at the University of Vermont. If any part of this provision shall become unlawful, impracticable, impossible to achieve or wasteful, then UVM Foundation's Board of Directors is authorized to make changes it deems appropriate based on my intentions and the mission of UVM Foundation.



# YOUR PRIVACY IS IMPORTANT

- Your estate plans are private matters.
- UVM Foundation respects your privacy.
- You have the ability to communicate your estate plans to UVM Foundation, with or without providing actual estate documents.
- You retain the right to revoke or alter estate or trust documents, at any time, with or without sharing your plans with UVM Foundation.
- Please consult your tax or legal advisors for official advice.



# CONTACTS

## **CHERYL A. BRODOWSKI**

Director of Legacy Giving

860-461-6240 Mobile

[cheryl.brodowski@uvm.edu](mailto:cheryl.brodowski@uvm.edu)

## **KEVIN MORGENSTEIN FUERST**

Assistant Vice President,  
Annual Giving Programs

802-656-3227 Office

[kevin.morgenstein-fuerst@uvm.edu](mailto:kevin.morgenstein-fuerst@uvm.edu)





The University of Vermont  

---

FOUNDATION

UVM Foundation is a Vermont nonprofit corporation and a 501(c)(3) publicly supported charity (federal tax ID 45-1556038) that secures and manages private support to benefit the University of Vermont.

Your gift is administered based on your intentions as well as policies approved by the Board of Directors of UVM Foundation. Visit [uvmfoundation.org](http://uvmfoundation.org) to view statements related to donor rights and privacy; gift, endowment and fee policies; board bylaws and meeting minutes; audited financial statements; IRS forms and documents; and FAQs.