

SAMPLE BEQUEST LANGUAGE

In order to make a bequest, you should speak with your attorney. Your attorney can help you include a bequest to Xavier University of Louisiana in your estate plan. We have provided some basic bequest language to assist you and your attorney.

Legal Name: Xavier University of Louisiana

Legal Address: 1 Drexel Dr., Box 66, New Orleans, LA 70125 Tax I.D. # 72-0635884

1. Specific Bequest

If you are considering making an outright bequest to Xavier University of Louisiana, we recommend the following language:

Bequest of a Specific Dollar Amount (Unrestricted)

I hereby give, devise and bequeath _____ and No/100 dollars (\$DOLLARS) to Xavier University of Louisiana, a nonprofit organization located at 1 Drexel Drive, Box 66, New Orleans, LA, 70125, Federal Tax ID #72-0635884, for Xavier University of Louisiana's unrestricted, general use and purpose.

Bequest of Specific Personal Property (Unrestricted)

I hereby give, devise and bequeath (DESCRIPTION OF PROPERTY) to Xavier University of Louisiana, a nonprofit organization located at 1 Drexel Drive, Box 66, New Orleans, LA, 70125, Federal Tax ID #72-0635884, for Xavier University of Louisiana's unrestricted general use and purpose.

Bequest of Specific Real Estate

I hereby give, devise and bequeath all of the right, title and interest in and to the real estate located at (ADDRESS OR DESCRIPTION OF PROPERTY), to Xavier University of Louisiana, a nonprofit organization located at 1 Drexel Drive, Box 66, New Orleans, LA, 70125, Federal Tax ID #72-0635884, for Xavier University of Louisiana's general use and purpose.

2. Restricted Bequests

*If you are considering a bequest but would like to ensure that your bequest will be used **for a specific purpose**, please contact the Office of Institutional Advancement for assistance, especially if you plan to make a restricted bequest. We will work with you and your attorney to help ensure that your legacy meets your charitable objectives.*

To a particular school or unit, (Unrestricted)

I hereby give to Xavier University of Louisiana, the sum of \$ _____ (or _____ percentage of my estate) to be used for the benefit of the _____ (school or division of your choice) without further restriction.

To a particular school or unit for a particular purpose (Restricted)

I give to Xavier University of Louisiana, the sum of \$_____ (or ____percentage of my estate) to be used by (school or unit of your choice) for the support of _____.

If it is ever impossible, impracticable, or inadvisable to use the gift in the manner set forth above, then my gift shall be used in an alternative manner that honors as closely as practical my original intentions as specified above. *(This sentence is crucial to include if there is any restriction placed on the use of the gift).*

NOTE: If you are making a restricted bequest, we recommend that your attorney include the following provision to give Xavier University of Louisiana flexibility should it no longer be possible for Xavier University of Louisiana to use your gift as you originally intended:

If, in the judgment of the Board of Directors of Xavier University of Louisiana, it shall become impossible for Xavier University of Louisiana to use this bequest to accomplish the specific purposes of this bequest, Xavier University of Louisiana may use the income and principal of this gift for such purpose or purposes as the Board determines is most closely related to the restricted purpose of my bequest.

3. Percentage Bequest

If you are considering making a bequest of a percentage of your estate to Xavier University of Louisiana, we recommend the following language:

I hereby give, devise and bequeath ____ percent (____%) of my total estate, determined as of the date of my death, to Xavier University of Louisiana, a nonprofit organization located at 1 Drexel Drive, Box 66, New Orleans, LA, 70125, Federal Tax ID #72-0635884, for Xavier University of Louisiana's general use and purpose.

4. Residual Bequest

If you are considering making a bequest of all or a percentage of the residual or remainder your estate to Xavier University of Louisiana, we recommend the following language:

I hereby give, devise and bequeath to Xavier University of Louisiana, a nonprofit organization located at 1 Drexel Drive, Box 66, New Orleans, LA, 70125, Federal Tax ID #72-0635884, ALL OR A PERCENTAGE of the rest, residue and remainder of my estate to be used for Xavier University of Louisiana's general use and purpose.

5. Contingent Bequest

If you are considering making a contingent bequest to Xavier University of Louisiana, we recommend the following language:

If (primary beneficiary) does not survive me, then I hereby give, devise and bequeath to Xavier University of Louisiana, a nonprofit organization located at 1 Drexel Drive, Box 66, New Orleans, LA, 70125, Federal Tax ID #72-0635884, DESCRIPTION OF PROPERTY to be used for Xavier University of Louisiana's general use and purpose.

Please call (504)520-7575 if you have any questions or email ia@xula.edu.

Xavier University of Louisiana, Office of Institutional Advancement

1 Drexel Dr., Box 66, New Orleans, LA 70125

www.xula.edu

Xavier University of Louisiana is a 501(c)3 organization.