

Ensuring your legacy

In life, we care for and support those individuals and organizations that mirror our beliefs and ideologies. Nearly 80% of adult Americans die interstate* (without a will) and their intentions are never made known. You can ensure your legacy is carried out with a carefully crafted will. It is never too early to establish your legacy and ensure your estate benefits those that matter most.

A will is the vehicle that ensures your wishes are carried out. Your will allows you to:

- ▶ detail charitable requests
- ▶ name a guardian for your minor children, aged parents or other legal dependents
- ▶ establish a trust or name trustees
- ▶ control disposition of your property
- ▶ name a personal representative to carry out the will
- ▶ provide for charitable enterprise and the advance of human well-being
- ▶ save estate and inheritance taxes and reduce expenses associated with death

The brief checklist below is information you should have in hand before making an appointment with your attorney:

- ▶ Statement of your objectives for yourself, dependents and charitable organizations
- ▶ Inventory of assets and their estimated value
- ▶ List of names and addresses of family, friends and charitable organizations to whom you intend to leave your assets
- ▶ Contact information of the person you intend to name as guardian of your children and other dependents
- ▶ Your concerns about the advisability of a trust and alternative provisions
- ▶ List of all debts including names and addresses and the basis for your indebtedness
- ▶ List of questions for your attorney

A last will and testament is subject to law through the processes of probate. Therefore, it should be properly drawn by a competent attorney. A will has jurisdiction over all the property owned by and titled to the testator. Property jointly owned will pass by title regardless of the terms of a will.



To include Lourdes University in your last will and testament, the bequest should read: "I hereby give, devise, or bequeath to Lourdes University" followed by a description of property to be given in specific kinds, percentages, number of dollars or remainders. ■

If you have already established a planned gift for Lourdes, please notify the University so that we may recognize you as a **Legacy Society** member. New members of the society are inducted annually at a special donor reception where they are presented with a special Legacy Society medallion. The date of this year's reception is **November 14, 2011**.

For more information, please contact **Aileen Meyer**, Director of Major Gifts, at 419-824-3813, ameyer@lourdes.edu or visit <http://www.lourdes.edu/donate/LegacyForm.pdf>.

**The Fundraising School, a program of The Center on Philanthropy at Indiana University.*