



Middlebury

Office of Gift Planning
giftplanning@middlebury.edu

700 Exchange Street
Middlebury, VT 05753
866.496.6433
middlebury.edu

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 Middlebury in a will or trust please use the following suggested language:

Residual Bequest Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give, bequeath and devise all (or ____ percent) of the rest, residue and remainder of my estate to the President and Fellows of Middlebury College, a corporation of the State of Vermont, located in Middlebury, VT, for the general and educational purposes of said Corporation.

Specific Bequest Language

You can also name Middlebury as a beneficiary of a specific amount from your estate:

I give, bequeath, and devise to the President and Fellows of Middlebury College, a corporation of the State of Vermont, located in Middlebury, VT, the sum of \$_____, (or, ____ percent of the rest, residue and remainder of my estate) to be used to support _____ (name of program or academic area.) In the event the need to support _____ no longer exists, the President and Fellows shall be and hereby are authorized to use this bequest for a purpose in keeping with the spirit of this gift in the best interest of the College.

Contingent Bequest Language

Middlebury can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to the President and Fellows of Middlebury College, located in Middlebury, VT, the sum of \$_____ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).

Gifts of Appreciated Securities:

Legal Name: President and Fellows of Middlebury College

Tax I.D. Number: 03-0179298

c/o Charles Schwab

DTC Number: 0164

Account #: 6277-6504

Reference: insert donor name/purpose

Please contact us for a stock transfer form.



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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 Anne McMenamin, Director of Gift Planning.

For Gifts of Securities, please contact the Office of Gift Planning for transfer instructions.

Legal

President and Fellows of Middlebury College
9 Old Chapel Road
Middlebury, VT 05753

Office

Office of Gift Planning
700 Exchange Street
Middlebury, VT 05753

Tax ID number

03-0179298

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 us at (866) 496-6433 or giftplanning@middlebury.edu.