



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 Colorado College in your client's will or trust please use the following suggested language:

Residual Gift Language

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

I give and devise to Colorado College, a 501 (c) (3), tax-exempt organization located in Colorado Springs, Colorado, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

Specific Gift Language

Naming Colorado College as a beneficiary of a specific amount from your client's estate is easy:

I give and devise to Colorado College, a 501 (c) (3), tax-exempt organization located in Colorado Springs, Colorado, the sum of \$ (or asset) to be used for its general support (or for the support of a specific fund or program).

Contingent Gift Language

Colorado College or its affiliates can be named as a contingent beneficiary in your client's will or personal trust if one or more of their specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to Colorado College, a 501 (c) (3), tax-exempt organization located in Colorado Springs, Colorado, 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

Please use the following instructions when transferring your client's securities to Colorado College:

For Account of:

Colorado College

Raymond James & Associates DTC #: 0725

Account #: 24455142

Colorado College Tax ID #: 84-0402510

Financial Advisor:

Todd Metzger

Raymond James & Associates 102 N. Cascade Ave., Suite 600 Colorado Springs, CO 80903

(719) 632-0266

Fax (719) 632-0106

As you complete your client's transfer, please contact Kathleen Bauer, Manager of Gifts and Acknowledgements, at (719) 389-6354 or kbauer@coloradocollege.edu.

For gifts of mutual funds or other investments, please contact the Office of Gift Planning.

Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation

Please have your client contact his/her plan provider for a change of beneficiary form. Once they have completed the form, please send a copy to Ty Nagamatsu, Estate Settlement & Gift Planning Officer at (719) 389-6828 or tnagamatsu@coloradocollege.edu.

Legal Name: Colorado College

Address: 14 East Cache La Poudre St., Colorado Springs, CO 80903

Federal Tax ID Number: #84-0402510

Note to Attorneys, Accountants and other professional Advisors

Thank you for helping your client with their charitable planning. As a professional advisor, you build your client relationships on trust and mutual respect. The same is true for our relationships with our friends and donors.

We understand that financial, philanthropic and estate goals are unique to the individual. For this reason we welcome the opportunity to assist as you incorporate your clients' philanthropic objectives into well-crafted estate plans. Furthermore, we encourage prospective donors to consult with their professional advisors before making decisions based on information we provide.

If you have any questions or concerns, please call Tily Nagamatsu, Estate Settlement & Gift Planning Officer at (719) 389-6828 or tnagamatsu@coloradocollege.edu.