

Giving through your will or living trust

There are several ways to name University of the Pacific in your will or living trust:

- Give a fraction or percentage of your estate
- Give a specific dollar amount
- Leave a residual gift that is made after all debts, expenses and bequests are made
- Designate Pacific to receive a specific asset (e.g. stocks or real estate)

With these gifts, you maintain complete control of your assets during your lifetime.

Suggested Bequest Language

Use the language below or visit legacy.pacific.edu for more examples.

"After paying all expenses, debts and other specific provisions, I give, devise and bequeath ____ percent of the rest and residue [or \$____ if a specific amount] to University of the Pacific, a non-profit corporation headquartered in California, Tax ID #94-1156266, currently with administrative offices at 3601 Pacific Avenue, Stockton, California 95211.

We are grateful for your support and thank you for taking action with us to transform students' lives through an immersive, service-oriented education.

Our Promises to You



HERITAGE SOCIETY
UNIVERSITY OF THE PACIFIC

Should you decide to change the lives of our passionate students by leaving a gift to University of the Pacific in your will or by beneficiary designation, please contact our office so that we may thank you and honor your commitment in the following ways:

- To include you as a member in Pacific's Heritage Society.
- To ensure we can use your gift and document the way you intended.
- To protect your privacy if you wish to remain anonymous.

University of the Pacific will continue to meet the highest standards of transparency in order to remain worthy of your legacy.

We're Here to Help

University of the Pacific

Office of Estate and Gift Planning

Phone: 209.946.2294

Email: legacy@pacific.edu

Visit: legacy.pacific.edu

Mailing Address:

University of the Pacific

3601 Pacific Avenue

Stockton, California 95211

This information is not intended as legal, accounting or other professional advice. For assistance in charitable planning, consult an attorney for legal advice or obtain the services of another qualified professional.

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Easy Ways to Leave a Legacy

GIFTS IN A WILL, TRUST OR BY
BENEFICIARY DESIGNATION

UNIVERSITY OF THE
PACIFIC

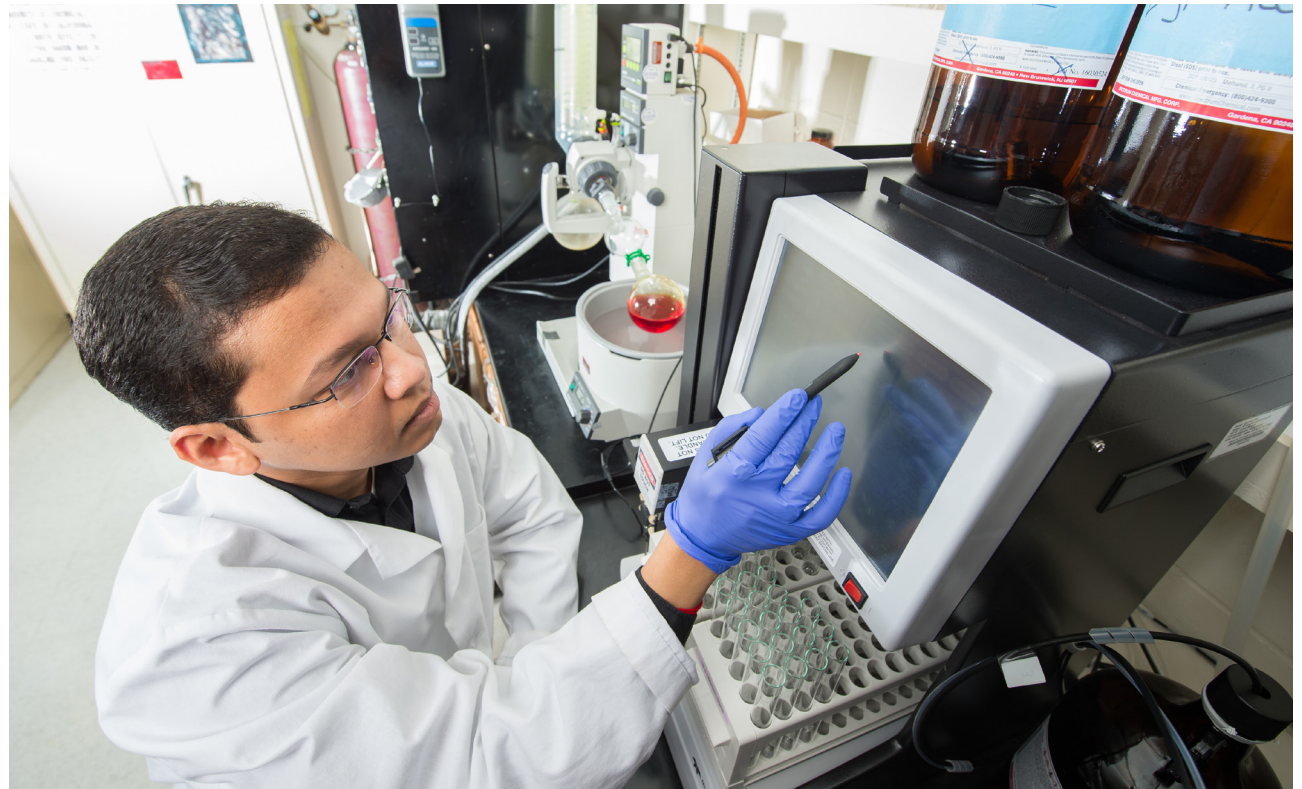
How Will You Be Remembered?



Throughout our lives, we reflect on what we have achieved and what we are still hoping to accomplish. This process is often how we reconfirm our values and align ourselves with what we most believe in.

Maybe you've wished you could do even more to encourage future generations to follow their dreams and serve their community, but your largest must wait.

There are many ways to achieve your desired outcome and maintain the flexibility you need. Please read on to learn more.



Gifts by Beneficiary Designation

You probably have assets that pass outside the provisions of your will or trust. Examples include life insurance policies, Individual Retirement Accounts (IRAs) and other retirement plans.

When you name Pacific as a beneficiary of one or more of these accounts it can reduce taxes for your loved ones. To name Pacific as a beneficiary simply contact the financial institution that administers the desired account and request a change of beneficiary form.

Benefits to You

A gift by beneficiary designation not only supports Pacific for years to come, but also...

- Costs you nothing now and requires nothing more than your signature.
- Can be changed at any time for any reason.
- Has no minimum required amount—a gift of any size makes a difference
- Can reduce or eliminate taxes on retirement assets