

## Sample Wording for Will and Living Trust Bequests

### 1. **Unrestricted Bequest**

I/we, [full legal name(s)], of [County, State] give and bequeath to University of the Pacific, a non-profit 501(c)(3) corporation organized under the laws of the State of California and located in Stockton, California, the sum of \$ \_\_\_\_\_ dollars (or \_\_\_\_% of my estate or description of property), to be used as the University may direct.

### 2. **Bequest for Unrestricted Endowment**

I/we, [full legal name(s)], of [County, State] give and bequeath to University of the Pacific, a non-profit 501(c)(3) corporation, organized under the laws of the State of California and located in Stockton, California, the sum of \$ \_\_\_\_\_ dollars (or \_\_\_\_% of my estate), to be invested and preserved as part of the scholarship endowment fund of the University.

### 3. **Bequest of Real Estate**

I/we, [full legal name(s)], of [County, State] give and bequeath to University of the Pacific, a non-profit 501(c)(3) corporation organized under the laws of the State of California and located in Stockton, California, all that unencumbered real property described as \_\_\_\_\_ (Insert property address) along with the appurtenances in fee simple, for the use and benefit of the University [or state purpose here].

### 4. **Residuary Clause:**

I/we, [full legal name(s)], of [County, State] give all the rest, residue, and remainder of my/our estate, [real, personal and mixed], of whatever kind of nature, and wherever situated, to University of the Pacific, a non-profit 501(c)(3) corporation organized under the laws of the State of California and located in Stockton, California, to be used as the University may direct [or state purpose here].

### 5. **Bequest for Restricted Endowment Scholarships:**

I/we, [full legal name(s)], of [County, State] give \_\_\_\_\_ [state specific school or unit] \_\_\_\_\_ at the University of the Pacific, a non-profit 501(c)(3) corporation organized under the laws of the State of California and located in Stockton, California, \$ \_\_\_\_\_ (or \_\_\_\_% of my estate), to [establish or enhance] "The \_\_\_\_\_ Endowed Scholarship. The fund shall be used to establish or enhance a scholarship or scholarships as outlined in my University of the Pacific gift agreement. **\*Note: restricted endowments must be accompanied with a gift agreement, please contact the Office of Estate and Gift Planning to assist you with this step.**

### 6. **Beneficiary Designation Change Form:** List spouse as primary (first) beneficiary and University of the Pacific, a non-profit 501(c)(3) corporation organized under the laws of the State of California and located in Stockton, California as secondary (contingent) beneficiary.

**Bequest Designation for Retirement Account:** The beneficiary is my spouse as long as [he/she] survives me. If my spouse does not survive me, I give and bequeath \_\_\_\_% of my retirement account held at \_\_\_\_\_ to the University of the Pacific, a non-profit 501(c)(3) corporation organized under the laws of the State of California and located in Stockton, California, to be used as the University may direct [or state purpose here].

**\*\*Please insert the appropriate school designation after "University of the Pacific" to direct support to a specific school, unit or program. For Example: *University of the Pacific, McGeorge School of Law***

University of the Pacific's TAX ID #94-1156266