



INSTITUTIONAL ADVANCEMENT AND UNIVERSITY RELATIONS
610-558-5550 | Fax: 610-558-5621

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 Neumann University in your 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 and devise to Neumann University (Tax ID #23-1657958), located in Aston, PA, 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 Bequest Language —

Naming Neumann University as a beneficiary of a specific amount from your estate is easy.

I give and devise to Neumann University (Tax ID #23-1657958), located in Aston, PA, the sum of \$ (or asset) to be used for its general support (or for the support of a specific fund or program).

Contingent Bequest Language —

Neumann University 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 Neumann University (Tax ID #23-1657958), located in Aston, PA, 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 contact Katie Cleland, Director for a stock transfer form.

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 Katie Cleland, Director.

Legal Name: Neumann University

Tax ID Number: 23-1657958

Incorporated In: Aston, PA

Note to Attorneys, Accountants and other professional Advisors:

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please contact Kimberly L McDermott at 610-558-5548 or MCDERMOK@neumann.edu.