

Bequest Intention

Bard

A bequest to Bard is one of the best ways to significantly provide for the future of the College. Bequest intentions disclosed to Bard make you eligible as a member of the Margaret and John Bard Society, Bard's legacy giving society, which includes many of the College's most generous supporters.

Through making a bequest, you may be able to make a larger gift than otherwise possible; your estate may save on estate taxes; and the arrangement is revocable, allowing for changes as needed. You may designate a bequest for a specific purpose or leave it unrestricted. An unrestricted bequest provides general support for Bard and allows the College to use the gift where it is most needed at the time. You can make a bequest to Bard College by preparing a new will or revising an existing one, with a provision that:

- makes a specific bequest of cash, securities, or other property by designating an exact dollar amount, a particular asset, or a fixed percentage of your estate
- makes a bequest of all or portions of your residuary estate after it has provided for all other beneficiaries by specific bequests
- makes Bard a contingent beneficiary of the estate by stipulating that the College will receive all or a portion of the estate if named beneficiaries do not survive you
- makes the College the remainder beneficiary of a trust established in the will to provide income plans previously described or a marital trust that pays all income to a spouse for life

Sample language to include in a will or codicil to a will:

- **For an unrestricted bequest:** *I give (the sum of _____ dollars) or (all or _____ percent of the residuary of my estate) to Bard College of Annandale-on-Hudson, New York, for its general purposes.*
- **For a restricted bequest:** *I give (the sum of _____ dollars) or (all or _____ percent of the residuary of my estate) to Bard College of Annandale-on-Hudson, New York, to be used for the following purpose: (state the purpose).*
- **For the bequest of residuary estate:** *I give (whatever remains) or (_____ percent of whatever remains) of my estate to Bard College of Annandale-on-Hudson, New York, after all specific bequests have been made and all expenses of administering my estate have been paid.*

In order to ensure that the evolving educational needs of future generations of Bardians can be met, it is advisable to include the following language with restricted gifts:

"If due to a change in circumstance, the designated purpose of my gift is rendered impossible or impractical, I (or we) authorize the Board of Trustees of the College to make such modifications as will appropriately recognize my interests in coordination with the College's priorities."

Please see reverse side to complete the form.

For more detailed information on including Bard in your plans, please contact:

Debra Pemstein, Vice President for Development and Alumni/ae Affairs
Bard College, PO Box 5000, Annandale-on-Hudson, NY 12504-5000
Phone: 845-758-7405 **Email:** mjbs@bard.edu

Bequest Form

Bard

In order to support Bard's educational mission, I have included a noncontingent bequest to Bard as part of my estate plan. Attached to this form is a copy of the relevant portion of my will. If I make any changes to this provision, I will notify Bard of such changes.

Name Alumni/ae Class Affiliation/Year Date of Birth

Street, City, State, Country/ZIP/Postcode

Home Telephone Business Telephone

Current Value of Bequest

Signature Date

Gift Recognition

By disclosing your bequest you will be recognized as a member of the Margaret and John Bard Society. Please indicate how you wish your name to appear in publications:

Preferred Name

I/We wish to remain anonymous in publications.

Please return with a copy of the relevant portion of your will or document to:

Debra Pemstein, Vice President for Development and Alumni/ae Affairs
Bard College, PO Box 5000, Annandale-on-Hudson, NY 12504-5000

Phone: 845-758-7405 **Email:** mjbs@bard.edu