



HOBART AND WILLIAM SMITH
COLLEGES

Wheeler Society and Planned Giving

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 Hobart and William Smith Colleges in your will or trust please use the following suggested language:

Sample Bequest Language for a Will or Trust (Specific Gift):

I/we give to Hobart and William Smith Colleges (Tax ID #16-0743040), located in Geneva, NY, the sum of \$ _____, or _____ % to be used for its general support (or for the support of a specific fund or program).

For contingent, residual and other types of bequest language, please contact Angela Tallo '05.

Federal Tax ID: 16-0743040

Legal Name: Hobart and William Smith Colleges

Incorporated in: Geneva, New York

Beneficiary Designations:

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:

Angela Tallo '05
Director of Planned Giving and The Wheeler Society
Tallo@hws.edu
(315) 781-3545
300 Pulteney Street
Geneva, NY 14456

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 Angela Tallo '05, Director of Planned Giving and The Wheeler Society at (315) 781-3545 or Tallo@hws.edu.