



## **SUGGESTED BEQUEST LANGUAGE AND INFORMATION TO PROVIDE YOUR NOTARY, LAWYER OR ESTATE PLANNER**

**Legal name:** Concordia University

**Address for visitors or courier:** 1250 Guy St., FB 520, Montreal, Quebec, H3H 2T4

**Mailing address:** 1455 De Maisonneuve Blvd. W., FB 520, Montreal, Quebec, H3G 1M8

**CRA Registration:** 106966591 RR0001

**American Friends of Concordia University Tax ID number:** 72-1601411

### **Suggested bequest language:**

**Unrestricted bequest:** An unrestricted bequest is a gift to Concordia that the university may use at its discretion. A suggested clause for this gift is:

“I give and bequeath the sum of \_\_\_\_\_ dollars (or designated property or portion of estate) to Concordia University in Montreal, Quebec, Canada, to be held or disposed of, as the university sees fit, for the advancement of education at said university.”

**Bequest with specific payout direction:** A bequest with specific payout direction is made when a donor wishes to leave a capital sum to the university and wishes to direct how the payout from the capital is to be used. Suggested clauses for this kind of bequest include:

#### **i) To establish an endowed scholarship or bursary**

“I give and bequeath the sum of \_\_\_\_\_ dollars (or designated property or portion of estate) to Concordia University in Montreal, Quebec, Canada to be held as an endowment fund, the payout of which is to be used by Concordia to create and maintain a scholarship and/or bursary to assist students in the pursuit of their studies at Concordia.”

“If, in the opinion of the university, it should become impossible, inadvisable or impractical to use this gift for the specified purpose(s), then the university may in its discretion use the gift to the best advantage of the university, keeping in mind my original wishes. In any such alternative application, the support provided by this bequest shall be clearly identified with the name of (donor’s name).”

#### **ii) To contribute to a specific need**

“I give and bequeath the sum of \_\_\_\_\_ dollars (or designated property or portion of estate) to Concordia University in Montreal, Quebec, Canada to be held as part of a permanent endowment for the (purpose for which payout is to be used).”

“If, in the opinion of the University, it should become impossible, inadvisable or impractical to use this gift for the specified purpose(s), then the University may in its discretion use the gift to the best advantage of the University, keeping in mind my original wishes. In any such alternative application, the support provided by this bequest shall be clearly identified with the name of (donor’s name).”

**Thank you for thinking of Concordia and future generations in your legacy plans.**  
**For more information, visit: [concordia.ca/plannedgiving](https://concordia.ca/plannedgiving).**

*Those considering or arranging a planned gift should consult with their income tax, financial and/or legal advisor.*