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# Leaving a Legacy Gift to Bow Valley College

Thank you for your interest in including Bow Valley College as part of your estate planning. Legacy gifts can be one of the most transformational gifts for our students and can help sustain the impact of our programs across many generations.

This document lists the most common types of bequests at the College and provides sample bequest language that may assist with your charitable gift planning decisions. While we hope they will help guide your process, they are provided as examples only and should be reviewed with your estate lawyer, financial planner, tax advisor, and other professionals.

While it is not necessary that legacy donors let us know of their planned gifts, doing so makes it possible for Bow Valley College to engage with you during your lifetime to more fully explore charitable interest areas and desired philanthropic impact. It also enables us to foster relationships with your family or successor advisors during your lifetime.

We encourage you to work with us to develop a gift agreement with Bow Valley College that embodies your wishes and may be changed at any time during your lifetime. This agreement can be adjusted as your charitable interest areas evolve without necessitating updating your will.

## **The three most common bequests types at the college are:**

1. General-Purpose Bequest  
A legacy gift to be used in such a manner as Bow Valley College's Board of Governors may direct.
2. Specific Bequest  
In your will, a specific dollar (\$) amount or percentage (%) may be left to Bow Valley College for a specific purpose.
3. Bequest to Establish an Endowment  
Bow Valley College keeps the principal amount (your legacy gift) intact once it is realized and uses the investment income for a specific purpose.

### General-Purpose Bequest (Sample Language)

I give the (sum, gift of property or percentage) of \_\_\_\_\_ to Bow Valley College (BN/ Registration # 878431683RR0001) to be used in such manner as the Bow Valley College's Board of Governors may direct.

### Specific Bequest (Sample Language)

I give the sum (or percentage) of \_\_\_\_\_ to Bow Valley College (BN/ Registration # 878431683RR0001) to support the charitable activities as detailed in the gift agreement named \_\_\_\_\_

\_\_\_\_\_ established with Bow Valley College during my lifetime.

Recognizing that in the future it may be found that the capital and income from this bequest cannot be

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used for the purpose expressed in the gift agreement, I give permission to alter the terms of my will to adhere as closely as possible to my original wishes; or if this is not possible, please direct my gift to the area of greatest need.

### Bequest to Establish an Endowment (Sample Language)

I give the sum (or percentage) of \_\_\_\_\_ to Bow Valley College (BN/ Registration # 878431683RR0001) to be held as a permanent\* endowment fund with the income to be used to support the charitable activities as detailed in the gift agreement named

\_\_\_\_\_ established with Bow Valley College during my lifetime.

Recognizing that in the future it may be found that the capital and income from this bequest cannot be used for the purpose expressed in the gift agreement, I give permission to alter the terms of my will to adhere as closely as possible to my original wishes; or if this is not possible, please direct my gift to the area of greatest need.

### Contact Us

If you have any questions about leaving Bow Valley College as a beneficiary of your estate, please contact:

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