

Making a Bequest to Shepherd University

Thank you for your interest in remembering Shepherd University in your estate plans. The following wording has been suggested by Foundation attorneys over the years. Once you have included Shepherd in your estate plans, you are eligible for membership in our Joseph P. McMurrin Society.

“I give, devise and bequeath to the Shepherd University Foundation, Inc. (Tax ID #55-6020064), a non-profit, charitable educational corporation in Shepherdstown, WV, 25443...

(a) The sum of \$ _____; or

(b) _____ percent of my estate; or

(c) specific property as

(c) all the rest, remainder and residue of my estate, including property over which I shall have power of appointment at my passing, after all debts, taxes, expenses and other bequests have been satisfied...

...to be used as the Shepherd University Foundation Board of Directors shall direct to meet the needs of Shepherd University students, faculty or programs [or, to meet the needs of a specific program, students, or faculty such as Economics]; or

...to be used as directed by the Shepherd University President to meet the needs of Shepherd University students, faculty or programs [or, to meet the needs of a specific program, student, or faculty such as Economics] ; or

...to establish a fund to be known as the Name Scholarship Fund, a permanent endowment, the income from which will be used to support scholarships for students majoring in a certain discipline such as Economics [the actual agreement listing criteria for award would be filed with the SU Foundation]; or

....to establish a fund to be known as the Name Faculty Excellence Fund, a permanent endowment, the income from which will be used to support awards for faculty of a certain academic discipline such as Economics program [the actual agreement listing criteria for award would be filed with the SU Foundation].

For further assistance, please contact:

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