Bequests

Have you thought of including College of Saint Mary in your estate plan so the support you provide year-to-year will continue indefinitely? Your thoughtful planning will allow CSM to help generations of women achieve their academic potential and grow personally from the intangibles that a women's college provides.

Perhaps now is the time to consider including College of Saint Mary in your estate plan by leaving a gift in your will or trust - a meaningful gift that costs nothing during your life. Your bequest may be for a set dollar amount, a percent or fraction of your estate, or part of the remainder of your estate after other bequests have been settled. A bequest can be a sensible way to provide significant resources to CSM. A bequest may also take the shape of a contribution of principal to trust that provides income to a loved one for the duration of their life, and afterward transferring the principal of that trust to College of Saint Mary.

While unrestricted bequests grant CSM freedom to allocate your support where the need is greatest, some CSM donors wish to nourish a beloved program or cherished project, or establish a new fund such as an endowed scholarship to honor a family member or a favorite instructor.

It is desirable that bequests restricted for explicit purposes be written in the broadest terms possible and that the donor confer with CSM throughout this process. It is especially advised that you consult with your attorney in drafting a bequest.

Several options may be employed in bequests. One is to include a simple declarative statement in a will or trust. A contingent bequest provides for a named beneficiary but will only benefit CSM if that named beneficiary predeceases you. Before making any changes to a will or trust, it is prudent to consult with your attorney to avoid conflicts with a carefully-crafted estate plan.

Please notify the Office of Institutional Advancement if you have remembered CSM in your estate plan. Your loyalty and generosity will be recognized in Our Lady of Mercy Society.

If you would like to learn more about other means of utilizing your estate for charitable donations to CSM, please contact Susan Medina at 800-926-5534, x2331 or smedina@csmedina.