

# ***BEQUESTS***

## ***Your Legacy to San Marcos Academy***

Bequests are one of the easiest and most significant ways you can enrich the lives of students at San Marcos Academy. Bequests give you the opportunity to make a statement about your personal values and perpetuate an important legacy for future generations. To complete your bequest, you can make a new will or simply add a codicil to your current will.

To insure that your exact intentions are carried out, will, codicils and other legal documents should be prepared by, and with the advice of, your attorney and other advisors.

### ***SAMPLE LANGUAGE FOR CHARITABLE BEQUESTS***

The following provides some suggested methods and wording for remembering San Marcos Academy in your will.

**SPECIFIC BEQUEST:** “I give \$ \_\_\_\_\_ (or a percentage) to San Marcos Academy, a Texas 501(c)(3) Non-Profit Corporation located in San Marcos, Hays County, Texas.”

Or

“I give the following described property to San Marcos Academy, a Texas 501(c)(3) Non-Profit Corporation located in San Marcos, Hays County, Texas: \_\_\_\_\_.”

**RESIDUARY BEQUEST:** “I give all (or a percentage) of the remainder of my estate to San Marcos Academy, a Texas 501(c)(3) Non-Profit Corporation located in San Marcos, Hays County, Texas.”

**CONTINGENT BEQUEST:** “In the event (primary beneficiary) does not survive me, I give said amount to San Marcos Academy, a Texas 501(c)(3) Non-Profit Corporation located in San Marcos, Hays County, Texas.”

### ***DESIGNATION***

**RESTRICTED BEQUEST:** This bequest specifies how you want the funds to be used. For example, you may wish to designate your bequest for student scholarships, a chair, a professorship or an area of study. If this is your desire, please contact us to ensure your goals and desires can be accomplished.

**HONORARY OR MEMORIAL BEQUEST:** This is a gift that honors or is a memorial to a person. We are pleased to honor your request and have many ways to grant appropriate recognition.

**ENDOWED BEQUEST:** This bequest requires us to hold the funds permanently in an interest bearing account and use only the investment income generated. Your gift continues giving indefinitely.

As example: “I give (amount, description of asset, percentage of estate, remainder, etc.) to San Marcos Academy, a Texas 501(c)(3) Non-Profit Corporation located in San Marcos, Hays County, Texas, for the purpose of establishing the \_\_\_\_\_ Endowed Scholarship Fund in \_\_\_\_\_. San Marcos Academy will invest and manage this fund as a separate and restricted account and will distribute only the earnings from the fund as specified by this request.”

## *APPRECIATION*

If you make a bequest to San Marcos Academy, please let us know. We would like to express our sincere appreciation for your generosity and recognize all who have included San Marcos Academy in their estate plans. Your generosity demonstrates an investment in the future of our students and in the Academy's mission for generations to come.

## *OUR MISSION*

*The mission of San Marcos Academy is to  
educate young men and women  
within a nurturing community  
based upon Christian values.*

For more information about making a bequest to benefit San Marcos Academy  
or for assistance with bequest plans, call or write:

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