

advancing SIMMONS

CREATE YOUR LEGACY: GIVING THROUGH A WILL OR TRUST

Including a bequest intention for Simmons College in your will or trust is a testament to your belief in Simmons and your confidence in our continued commitment to our mission to provide transformative learning that links passion with lifelong purpose, and in doing so to make a difference in the lives of our current students and future generations. A bequest is the most common form of planned gift received by Simmons and one of the easiest to make.

HOW IT WORKS:

You may include a bequest of any size to Simmons College in your will or trust. As part of your bequest intention you may direct that your gift either be unrestricted to be used by Simmons for general purposes or for a specific purpose or program at (e.g., financial aid scholarship, faculty support, athletics, etc.).

You may name Simmons as a primary beneficiary to receive either a specific dollar amount or a percentage of your estate. Alternatively, you may leave either all or a percentage of the remainder of your estate to Simmons. You also have the option of naming Simmons as a contingent beneficiary in your will or trust if one or more of your specific bequests cannot be fulfilled. Please see the reverse side for Sample Bequest Language.

BENEFITS:

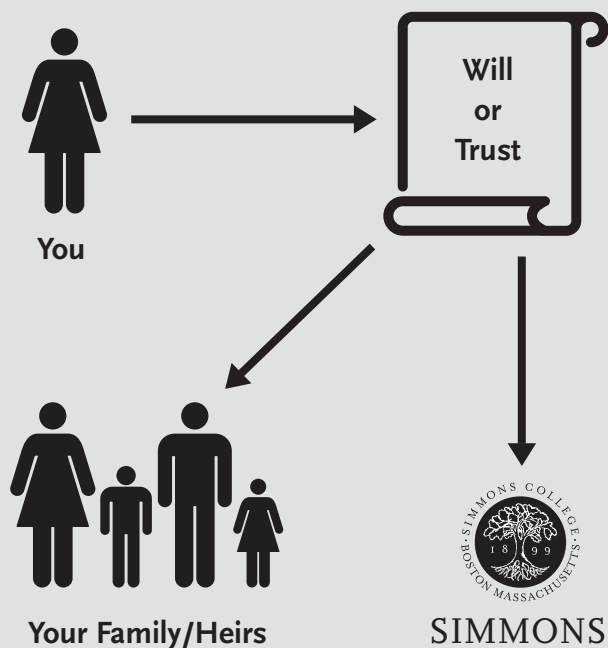
- Your assets remain in your control during your lifetime.
- You can modify your bequest, as needed or desired, to address changing circumstances.
- A bequest for Simmons may be deductible for federal estate tax purposes, and there is no limit on the amount of the estate charitable tax deduction.
- In addition, charitable bequests generally are not subject to estate inheritance or estate taxes.

A SPECIAL PLANNED GIVING OPPORTUNITY FOR DONORS AGE 70 OR OLDER:

If you will be 70 years or older by June 30, 2015, and you are willing to sign a Letter of Intent and provide a copy of your estate plans, Simmons might be able to include a portion of your bequest intention in fundraising totals for the Making Education Work Campaign.

Simmons will celebrate the faith our alumnae/i, parents, and friends have expressed in the future of Simmons by their remembrance of the College in their estate plans with a labyrinth that will be created and unveiled on campus at the Making Education Work Campaign Celebration in October 2015. Located beside this ancient symbol of spirituality and mindfulness will be a rough-hewn stone with a bronze plaque bearing the names of those who have remembered Simmons in their estate plans and who have notified the College during the Making Education Work Campaign.

This is a wonderful opportunity to not only participate in the Making Education Work Campaign, but to be publicly and permanently recognized for your selfless and generous support of Simmons. We hope you will consider being a part of this unique and exciting celebration.



Should you be interested in including a bequest provision benefitting Simmons College in your will or trust, you are encouraged to seek out the advice of your legal and/or financial counsel and to share the following sample bequest language with them:

SPECIFIC DOLLAR AMOUNT BEQUEST LANGUAGE:

I give, devise, and bequeath the sum of \$_____ to Simmons College, a Massachusetts charitable corporation, located at 300 The Fenway, Boston, MA 02115 (Tax ID 04-2103629), to be used for its general purposes without restriction.

PERCENTAGE BEQUEST LANGUAGE:

I give, devise, and bequeath _____ % of my property, real and personal and wherever situated, owned by me at my death, to Simmons College, a Massachusetts charitable corporation, located at 300 The Fenway, Boston, MA 02115 (Tax ID 04-2103629), to be used for its general purposes without restriction.

RESIDUAL BEQUEST LANGUAGE:

I give, devise, and bequeath all (or a percentage) of the rest, residue, and remainder of my estate, both real and personal, wherever situated, owned by me at my death, to Simmons College, a Massachusetts charitable corporation, located at 300 The Fenway, Boston, MA 02115 (Tax ID 04-2103629), to be used for its general purposes without restriction.

CONTINGENT BEQUEST LANGUAGE:

If [insert name(s) of Primary Beneficiary] is not living at the time of my demise, I give, devise and bequeath to Simmons College, a Massachusetts charitable corporation, located at 300 The Fenway, Boston, MA 02115 (Tax ID 04-2103629), the sum of \$ _____ (or all or a percentage of the residue of my estate) to be used for its general purposes without restriction.

For more information about planned giving opportunities at Simmons College, please contact Director of Capital Giving, Maria Mike-Mayer at 617-521-2335 or plannedgiving@simmons.edu.



300 The Fenway
Boston, MA 02115

simmons.edu/makingeducationwork