

## Samples of Bequest Language

### Unrestricted Bequest (College can use the money wherever needed the most)

“I give and bequeath to Juniata College of Huntingdon, Pennsylvania, an educational institution organized under the laws of the Commonwealth of Pennsylvania, the sum of \_\_\_\_\_ dollars (\$\_\_\_\_\_) [or \_\_\_\_\_ percent (\_\_\_\_\_% ) of my residuary estate].”

### Restricted Bequest (College is bound by law to use per restriction in will or trust) (The sample below indicates a designation for a scholarship).

“I give and bequeath to Juniata College of Huntingdon, Pennsylvania, an educational institution organized under the laws of the Commonwealth of Pennsylvania, the sum of \_\_\_\_\_ dollars (\$\_\_\_\_\_) [or \_\_\_\_\_ percent (\_\_\_\_\_% ) of my residuary estate], to be used to establish the \_\_\_\_\_ Scholarship, the income from which shall be used to provide financial assistance to a worthy student or students attending Juniata.”

**Note: The minimum requirement to endow a named scholarship at Juniata is \$50,000. Therefore, you could name the scholarship whatever you wanted. The above restricted bequest sample is the least restrictive because it can be awarded to any student who has demonstrated financial need.**

“I give and bequeath to Juniata College of Huntingdon, Pennsylvania, an educational institution organized under the laws of the Commonwealth of Pennsylvania, the sum of \_\_\_\_\_ dollars (\$\_\_\_\_\_) [or \_\_\_\_\_ percent (\_\_\_\_\_% ) of my residuary estate], to be used to establish the \_\_\_\_\_ Scholarship, the income from which shall be used to provide financial assistance to a student or students who have demonstrated financial need with preference given to students majoring in **[accounting, business or economics; sciences, including but not limited to, biology, chemistry, geology, environmental science or physics; English or communications; mathematics or computer science; political science or pre-law; informational technology; education; or taking classes in music, etc.]**.

**Note: The above allows you to designate a field of study. I have give n you several fields of study options. As long as the language contains the words “preference given to” then it allows for the awarding of this scholarship. If the field of study contained in the language no longer exists or if there are no students in the particular field of study who qualify for financial need, then the scholarship is awarded to any student who demonstrates financial need regardless of their field of study.**