



Class of 1985

How to Leave a Bequest to Dartmouth

Including Dartmouth in your estate plans is a wonderful way to leave an enduring legacy and provide critical support for the College. Bequests are extremely flexible, allowing for revisions should your circumstances change, and are received by the College after your lifetime.

The Bartlett Tower Society (BTS) recognizes donors who have made a bequest to the College by naming Dartmouth as a beneficiary of their estate through a will, living trust, retirement account, or life insurance policy.

Will or Living Trust:

To name Dartmouth as a beneficiary of your estate through a will or living trust, your attorney will need the following information:

1. The legal/corporate name of the College: Trustees of Dartmouth College
2. Bequest language – unrestricted bequests:
“I hereby give, devise and bequeath to the Trustees of Dartmouth College ___ dollars or ___ percent of my residuary estate, whichever is less, to be used for the benefit of Dartmouth College as the Trustees thereof may direct.”
3. Notify the Gift Planning office of your bequest by emailing julie.hinman@dartmouth.edu a copy of your will or living trust - all information not pertaining to Dartmouth may be redacted.

If you would like your bequest to be used for a specific purpose, please contact Gift Planning and they will provide you with alternative bequest language.

Retirement Account or Life Insurance Policy:

Naming Dartmouth as a beneficiary of a retirement account or life insurance policy is one of the easiest and most tax-efficient ways to leave a bequest to the College and also qualifies you for membership in the Bartlett Tower Society (BTS).

1. Go to the website of your plan administrator and find the beneficiary designation form
2. Name Dartmouth as a primary beneficiary* of a percentage or specific dollar amount
 - Name: Trustees of Dartmouth College
 - Address: Gift Planning Office, 6066 Development Office, Hanover, NH 03755
 - Social Security Number: enter Dartmouth’s Tax ID #02-0222111
3. Notify the Gift Planning office of your bequest by emailing julie.hinman@dartmouth.edu a copy of the beneficiary designation form - all information not pertaining to Dartmouth may be redacted.

If you would like your bequest to be used for a specific purpose, please contact Gift Planning and they will provide you with additional forms to document your wishes.

*Please note, in order to qualify for BTS membership, Dartmouth must be named as a primary beneficiary rather than a contingent or secondary beneficiary.

For more information, please contact Gift Planning at (800) 451-4067/gift.planning@dartmouth.edu., or class Gift Planning Chair, Beth Hobbs at (704)-375-0080/hobbsnc@mac.com.