

For many friends and alumni of **PEAF**, the best way to make a gift to the foundation is in the form of a bequest. **Bequests** can be made through gifts of cash, securities, real estate, and tangible personal property.

CASH BEQUEST

PEAF receives a specific dollar amount.

BEQUEST OF PROPERTY

PEAF receives specific assets, such as securities, an interest in real estate (such as a residence), or tangible personal property (e.g., works of art, antiques).

RESIDUARY BEQUEST

PEAF receives all or a percentage of the remainder of the estate after the payment of any specific bequests and all estate-related expenses.

TESTAMENTARY TRUST

The trust provides one or more heirs with income for life, after which the assets pass to **PEAF**.

UNRESTRICTED BEQUEST

Allows **PEAF** to determine the wisest and most pressing need for the funds at the time of receipt – without considerations attached.

RESTRICTED BEQUEST

This gift is dedicated for a specific purpose or project.

HONORARY OR MEMORIAL BEQUEST

This gift is given “in honor” or “in memory” of the donor, in the donor’s name or on behalf of someone else.

ENDOWED BEQUEST

This bequest restricts the principal of the gift, requiring **PEAF** to hold the funds permanently and use only a small percentage of its value each year.

Note: The techniques and strategies above are intended to provide accurate information regarding the subjects covered; however, they are furnished with the understanding that the Plentywood Education & Alumni Foundation is not engaged in rendering legal, accounting, or other professional advice or counsel. The foundation encourages the reader to seek competent professional counsel to address any legal or other issues that may arise before making a gift.