



Gifts from Your Will or Trust (Bequest) or Retirement Plan

A will is your opportunity to direct how your estate – regardless of its size – passes upon your death. You can support Southwestern Baptist Theological Seminary (SWBTS) by making a gift of a specific dollar amount, by giving a specific asset, or by making a gift of a percentage of your estate. Need to preserve assets? You can plan a gift to us that will take effect only after your other final obligations are fulfilled. A gift through your will or estate is the easiest gift you can make today.

A bequest is a gift to SWBTS at your passing, generally through a provision in your will or living trust. It may be revoked at any time during your lifetime if your situation changes.

We suggest that you make your bequest unrestricted or direct it to a specific purpose. A bequest might not be received by SWBTS for many years, so there's a delay in funding the gifted purpose. As a result, restrictions placed on the use of your gift should be as minimal as possible, providing SWBTS with maximum flexibility as priorities and programs change over time.

Benefits of a Gift through Your Will:

- Your assets remain in your control during your lifetime.
- You can modify your gift to address changing circumstances.
- You can direct your gift to a particular purpose (be sure to check with the SWBTS Advancement Office to make sure your gift can be used as intended).
- Under current tax law, there is no upper limit on the estate tax deduction for your charitable bequests.

Tell us about your gift so we may celebrate your generosity now. Please let us know if you have already included SWBTS in your estate plan or if you are considering doing so. Your plans will remain confidential, and we will be able to ensure that when the time comes, SWBTS understands and can abide by your intentions.

Don't have a will yet? If you die without having a will and/or estate plan, a court may make important decisions for you, and these decisions may not reflect your wishes and could create conflict and hardship for your family. Let us assist you through every step. Contact us for guidance and for Sample Gift Language or a Sample Codicil for your Will or Trust.

Disclaimer

Please have your will or codicil drafted by an attorney who is familiar with the estate laws of the state where you live. We are not engaged in legal or tax advisory service. Our goal here is to provide general gift, estate, and financial planning information.

Watch for tax revisions. State laws govern will, trusts, and charitable gifts made in a contractual agreement. Advice from legal counsel should be sought when considering these types of gifts.

Contact us for Assistance:

Email: giving@swbts.edu

Phone: 817-921-8830

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