

**Thank you for considering how your planned giving can benefit MTSO students and those they will serve far into the future.** Please share the sample language below with your legal counsel. We encourage all donors or their advisors to contact the MTSO Development Office for guidance as to correct language. If you wish to establish an endowment with your charitable bequest, we will prepare for your consideration a separate fund agreement to be signed by you and the school.

### UNRESTRICTED BEQUESTS

**The following is suggested language for unrestricted bequests to be used for the greatest current need of the school.**

I give to Methodist Theological School in Ohio, a not-for-profit corporation organized under the laws of the state of Ohio and located in Delaware, Ohio (*choose one of the following*):

- \_\_\_\_\_% of my estate;
- The sum of \$\_\_\_\_\_;
- All my right, title, and interest in the following described property:

\_\_\_\_\_;

- All the rest, residue, and remainder of my estate;

to be used in such manner as the Board of Trustees of MTSO, at its sole discretion, determines.

### RESTRICTED BEQUESTS

**The following is suggested language for restricted bequests to be used for a purpose designated by you.**

I give to Methodist Theological School in Ohio, a not-for-profit corporation organized under the laws of the state of Ohio and located in Delaware, Ohio (*choose one of the following*):

- \_\_\_\_\_% of my estate;
- The sum of \$\_\_\_\_\_;
- All my right, title, and interest in the following described property:

\_\_\_\_\_;

- All the rest, residue, and remainder of my estate;

to be used for the following purpose:

\_\_\_\_\_.

The designation of the preferences for which this gift is to be used shall not be construed as requiring the administration of this gift as a trust, the furnishing of bonds, or the making of annual reports to the court.

In the event the Board of Trustees of Methodist Theological School in Ohio, at its sole discretion, determines that the use of this gift for the preferences stated is no longer legal, practical, or possible of performance, or for other good and lawful reason, then said preferences should be changed, and said board of trustees shall use this fund for such purposes as said board, in its sole discretion, determines will best promote and support theological education at Methodist Theological School in Ohio.

## BEQUESTS RESTRICTED FOR ENDOWMENT

For restricted bequests to establish a named permanent endowment fund, we suggest the following language.

I give to Methodist Theological School in Ohio, a not-for-profit corporation organized under the laws of the state of Ohio and located in Delaware, Ohio (*choose one of the following*):

- \_\_\_\_\_% of my estate;
- The sum of \$ \_\_\_\_\_;
- All my right, title, and interest in the following described property:

\_\_\_\_\_;

- All the rest, residue, and remainder of my estate;

to be used for the following named fund:

\_\_\_\_\_.

Details for the management and administration of this fund are contained in the final Fund Agreement with Methodist Theological School in Ohio signed by me and the appropriate representative of Methodist Theological School before my death.

The property constituting this gift may, at the sole discretion of the Board of Trustees of Methodist Theological School in Ohio, be merged with the general assets of said school for more convenient administration or investment, but the gift shall be entered in said school's books and records as

\_\_\_\_\_.

and this fund shall be used for the preferences as defined in the final Fund Agreement with Methodist Theological School in Ohio signed by me and the appropriate representative of Methodist Theological School before my death.

The designation of the preferences for which this gift is to be used shall not be construed as requiring the administration of this gift as a trust, the furnishing of bonds, or the making of annual reports to the court.

In the event the board of trustees of Methodist Theological School in Ohio, at its sole discretion, determines that the use of this gift for the preferences stated is no longer legal, practical, or possible of performance, or for other good and lawful reason, then said preferences should be changed, and said board of trustees shall use this fund for such purposes as said board, at its sole discretion, determines will best promote and support theological education at Methodist Theological School in Ohio.

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On behalf of our students, we thank you for your consideration of a planned gift to MTSO. For further assistance, please contact:

**Claudine Leary**  
**Director of Development**

740-362-3323

cleary@mtso.edu

3081 Columbus Pike  
Delaware, OH 43015