



Including Sigma Xi in Your Will

Introduction

A bequest is a unique opportunity to benefit Sigma Xi for many years to come, and it's one of the simplest ways to make a gift to the Society. Although there are many reasons Sigma Xi members have included the Society in their estate planning, the outcome is a legacy of giving that benefits future generations of research scientists and engineers and honors a life's work.

Throughout its history, bequests have been vitally important in the life of Sigma Xi, providing much needed assistance for future generations of researchers as well as support for a variety of programs that promote the health of the research enterprise and for the general operations of the Society.

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To make a gift to Sigma Xi from your estate, you must sign a new will or trust instrument, add a codicil to your present will or make an amendment to your present trust instrument. Bequests or devises to Sigma Xi can include specific designations of cash, securities, or real estate, as well as the residual property of your estate or a percentage of the residual of your estate. If you decide to make a bequest, share your plan with your attorney and financial advisors, who will draft appropriate language for your will and help structure the gift effectively.

You can name Sigma Xi as the direct beneficiary of a stated amount of money or a stated percentage of your estate. You can also designate Sigma Xi to receive all or a portion of the remainder of the estate once all specific bequests have been satisfied. You may even designate Sigma Xi as a contingent beneficiary in the event that family members or other beneficiaries do not survive you.

Here is sample language that can be used to provide a bequest:

I give, devise, and bequeath to Sigma Xi, The Scientific Research Honor Society, a charitable organization whose national headquarters is located in Research Triangle Park, North Carolina, (the sum of \$____); (____ percent of my estate); (the following property: _____); or (the rest, residue, and remainder of my estate).

Stay in touch

Donors are encouraged to consult an advisor before writing a will that includes any type of restriction on a bequest, whether it is for program use or in how the bequest would be managed. The sample language provided is designed to be a starting point in considering how to include Sigma Xi in your estate planning. The Development staff will be pleased to discuss further any questions you or your advisor might have about including Sigma Xi in your will:

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Sigma Xi is a 501(c)3 not-for-profit. All donations made are tax-deductible.
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