



**UT Health**  
San Antonio

UT Health San Antonio Office of Gift Planning  
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## Advisor's Guide for Planned Giving

### Gifts from Wills and Trusts:

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name UT Health San Antonio in a will or trust please use the following suggested language:

### Bequest Language

*I give, devise and bequeath \* to the Board of Regents of The University of Texas System ("Board") for the use and benefit of The University of Texas Health Science Center at San Antonio, (UTHSCSA).*

### Option A – Gift for General Use

*This gift shall be used in support of (state purpose). These funds shall never become a part of the Permanent University Fund, the Available University Fund or the General Fund of the State of Texas and shall never be subject to appropriation by the Legislature of the State of Texas.*

### Option B – Gift to Create an Endowment

*This gift shall be used to create the (name of endowment\*\*) and shall be held in perpetuity for the benefit of the [SCHOOL, DEPARTMENT]. Funds distributed from the endowment shall be used to (state purpose). These funds shall never become a part of the Permanent University Fund, the Available University Fund or the General Fund of the State of Texas and shall never be subject to appropriation by the Legislature of the State of Texas.*

*These funds and all future gift additions to the endowment, reinvestments, and required matching funds referenced in this agreement (including those made by the Board or the UTHSCSA), shall be subject to the provisions of this agreement and shall be classified as permanent endowment funds.*

*Changes to the terms of this agreement require a written amendment, signed by the same Donors who sign this agreement, so long as they are living and competent to act, and agreed to by the signing Donors, the UTHSCSA, and the Board. Individuals and entities who make additional gifts to the endowment, but who are not signers to this agreement, shall have no authority to consent to changes, nor shall the Board or the UTHSCSA be required to provide notice or obtain consent from additional donors to the endowment. If unforeseen circumstances alter or remove the subject area or the purpose of this endowment from the UTHSCSA's mission or if the purposes for which the endowment is established become illegal, impracticable, or are no longer able to be carried out to meet the needs of the UTHSCSA, the Board may designate an alternative use for the endowment payout in accordance with applicable state law to further the objectives of the UTHSCSA in the spirit of the original purpose.*

*Donors agree that the Board and the UTHSCSA may amend this agreement if required to maintain the public trust or protect the mission and integrity of the UTHSCSA.*

#### **IV. INVESTMENT, PAYOUT AND REINVESTMENT**

These endowment funds may be merged or commingled with other funds held by the Board for investment purposes in accordance with the policies of the Board. In connection with administration and management of the endowment funds, and in order to support development efforts to enhance the institution's philanthropy, the Board may authorize allocations against the endowment. Funds distributed from the endowment in a year may be retained and expended for the purposes of the endowment in subsequent years, or may be reinvested, at the discretion of the Board or the UTHSCSA, as a permanent addition to the principal of the endowment.

Legal name: Estate gifts and beneficiary designations are directed to the Board of Regents of The University of Texas System for the benefit of UT Health San Antonio  
Federal Tax ID Number: 30-0710145

#### **Specific programs can be named in a bequest or gifts can be made to support general areas.**

For example:

- Student scholarships (can name the School)
- Faculty support (can name the School)
- Research in specific area (Cancer, Alzheimer's, Diabetes or other areas)
- Community Health (disaster relief, women and children, veterans, mental health drug use or other)

For Gifts of Securities, please contact the Office of Gift Planning for transfer instructions.

#### **Note to Attorneys, Accountants and other Professional Advisors**

Thank you for helping your client with their charitable planning. The Office of Gift Planning is available to discuss with you or your client, their charitable intentions to help ensure the gift makes the desired impact. If you need information or if you have any questions or concerns, please contact us, at 210-567-9219 or [plannedgiving@uthscsa.edu](mailto:plannedgiving@uthscsa.edu).