



BENTLEY
UNIVERSITY

THE BENTLEY PLANNER

WHAT WILL YOUR LEGACY BE?



Connecting the Past, Present and Future

Over 100 years ago, Harry C. Bentley set out to improve the study of accounting. His commitment to excellence laid the foundation for Bentley's success and growth. Bentley's path took it from Boston to Waltham, from a school to a university and from certificate coursework to graduate study. Today, a variety of undergraduate and graduate programs help students develop specialized expertise and analytical skills to use throughout their professional careers.

As you reflect on your own journey and plan your future, you may be thinking about the people and institutions that helped make your life's accomplishments possible. If Bentley is among them, and if you would like to help others on their educational paths, you may wish to plan a future gift to the university.

Future gifts are crucial to sustaining the tradition and enhancing the quality of a Bentley education for dedicated students in years to come. They reaffirm our shared commitment to excellence and secure Bentley's strength and vibrancy for the long term. Plus, when you plan a future gift to Bentley, you express your belief in education, and your gift becomes part of your legacy.

If you've been considering a future gift, feel free to contact us to start a conversation. We'd love to listen thoughtfully to your ideas and help develop a personalized plan that's right for both you and Bentley. Whether you choose to make an undesignated gift to Bentley or direct it to scholarships, academic programs or a different area, your financial support will ensure that Bentley can continue to offer invaluable educational experiences for deserving students far into the future.



Planning Your Future Gift for Bentley

Whether you are starting the process for the first time, or updating a plan already in place, it is easy to add Bentley to your estate plan. Including a future gift for Bentley in your plan takes just three steps.

1 Gather information.

As you reach out to your attorney and financial advisor, we recommend that you also contact us to explore the difference you can make at Bentley. There are many ways to set up your gift, including directing it generally to Bentley, to financial aid, or to another part of the university meaningful to you. Our services are complimentary, and we are available to speak with you confidentially at any time.

2 Decide what charitable plan works best for you.

If you wish to retain control of your assets during your lifetime, a gift in your will or trust, or by beneficiary designation (applicable to bank, investment, and donor advised fund accounts, life insurance policies, retirement plans, and, in some states, real estate), may be best for you. Depending on the intended purpose of your gift, we may suggest supplementary documentation to clarify your intentions.

3 Document your gift in your estate plan and with Bentley.

Once you have included Bentley in your plan, we'd be honored if you would let us know. We'd like to express our appreciation and invite you to join The 1917 Legacy Society.

Sample language

For your will or trust

"I give to Bentley University, a Massachusetts educational corporation with a usual place of business at 175 Forest Street, Waltham, Middlesex County, Massachusetts, the sum of dollars (\$_____) or (_____% of my property), to be used (for the general purposes of Bentley) or (as agreed by Bentley and me in a Legacy Intentions Document)."

For your beneficiary designation form

Beneficiary Name and Address:

Bentley University
175 Forest Street
Waltham, MA 02452

Bentley's Tax ID Number:
04-1081650

*Bentley may be a sole, partial, or contingent beneficiary.
If additional information is requested, please contact us.*

We greatly appreciate your consideration. Feel free to contact us directly by phone or email, request our new Estate Planning Guide and Personal Organizer, or visit us on the web at giftplanning.bentley.edu, where we offer additional resources, interactive planning tools and relevant information.

*The content in this newsletter is offered for informational purposes only.
We recommend that you consult your tax or legal advisor(s) for applicability to your own situation.*

Paving the Path



Born in Canada and raised in Boston, **Rob Wright '68, MSF '82** learned Bentley would be right for him after a high school teacher made the recommendation. “I didn’t have any idea what I wanted to do until I took a bookkeeping class my senior year. Something clicked.” His teacher knew just the place where Rob could excel.

“It was the first of many times in my career where someone helped pave a better path for me.”

As Rob neared his graduation from Bentley, a partner from Touche Ross (now Deloitte) took a chance on him, offering an entry-level position. “I was not a 4.0 student by any means,” he remembers with a laugh. “But I guess he saw something in me.”

“My Bentley experiences were top-notch and extremely meaningful, and I credit Bentley for much of my success.”

Grateful for the professional opportunity, Rob did his share of weekend inventories and soon observed colleagues who were “married to the firm.” He decided to work to live – not the other way around – and transitioned to a smaller firm. An avid sailor, he would have lunch on his Long Wharf-docked boat, or take it for a turn after work.

In the 1980s, Rob returned to Bentley to further develop his expertise, earning a master’s degree. “My graduate degree from Bentley was another step along my path that paid off – I’m sure it helped me obtain my next position, at Ropes & Gray.” Currently, Rob is consulting, having founded Fenway Financial Consultants 20 years ago to guide the accounting and human resources departments of small companies.

As Rob looked ahead, he knew that he wanted to show his gratitude for his Bentley education. He decided to include a generous gift for Bentley in his estate plan to support the university’s mission of hiring exceptional faculty and attracting the most talented and committed students – a gift to help pave a better path for Bentley’s future.

To read more about Rob, and meet other Bentley legacy donors, visit:
giftplanning.bentley.edu/donors



New Estate Planning Guide and Personal Organizer

Our new, expanded Estate Planning Guide and Personal Organizer is a valuable tool to help you navigate your planning process, consider how you will provide for the people and organizations meaningful to you, and gather and record specific information. To request a print or electronic version, please return the attached reply card or visit:

giftplanning.bentley.edu/estate-planning

Contact the Office of Gift Planning

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