



Planned Gift Notification – Confidential

Personal Information

Name: _____

Spouse Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Class(es): _____ Date(s) of Birth: _____

Your Gift Intention

Please provide the following information and attach a copy of the documentation or appropriate language from your will or trust, if available. Please complete all that apply.

- I/We want to support the Montgomery Bell Academy (MBA) through a planned gift as described below:
 - I/We have included a bequest for MBA my/our will or living trust.
 - I/We have named MBA as a beneficiary of an asset:
 - Retirement Plan Bank, Investment, or Other Financial Account
 - Life Insurance Policy Other: _____
 - I/We have named MBA as a revocable/irrevocable (*circle one*) beneficiary of a charitable remainder trust.

The anticipated value of my/our gift is/will be approximately \$ _____ or _____ % of my/our estate. *(If possible, please include a copy of the bequest language or other wording describing your planned gift.)*

Please provide a general description of the gift provision *(such as, asset to be donated if other than cash or securities, how gift is to be used, whether gift is to create an endowment, etc.)*:

- Yes, you may include me/us in listings of planned gift donors.

Please indicate how you would like your name(s) to appear in our **James Robertson Society** listings. *(please note the amount of your intended gift will not be published)*:

- No, please do not include me/us in listings.

Signature(s): _____

Date: _____