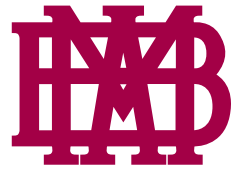


# Planned Gift Notification – Confidential



## 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 Montgomery Bell Academy (MBA) through a planned gift as described below:
  - I/We have included a bequest for MBA in 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.

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.

The current anticipated value of my planned gift is \$\_\_\_\_\_. This places me in the following planned giving society. Please understand that this is my current intention and does not represent a legal or binding commitment.

- ≥ \$1,000,000 – H. Frank Burkholder, Jr. Society
- ≥ \$100,000 – The Hill Society
- ≥ \$500,000 – Gentleman, Scholar, Athlete Society
- < \$100,000 – James Robertson Society

Signature(s): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date: \_\_\_\_\_