



CONFIDENTIAL STATEMENT OF ESTATE INTENTIONS

Name _____ Class year or affiliation _____

Mailing Address _____

Date of Birth: _____

I have made provisions for The GreenMount School in my estate as follows:

Estimated Amount of the Current Value of your Gift

- Fixed dollar amount as an outright gift in:
 - _____ My will or trust \$ _____
 - _____ Surviving spouse or partner's will or trust
- Percentage (_____ %) for GreenMount of the residue clause of a _____ will or _____ revocable trust \$ _____
- Percentage (_____ %) remainder for GreenMount in a Charitable Trust \$ _____
- Percentage (_____ %) for GreenMount as beneficiary of IRA, 401(k), TIAA-CREF or other pre-tax retirement account \$ _____
- Other, please check if applicable: \$ _____
 - _____ Contingent provision to take effect if other beneficiaries predecease me
 - _____ Beneficiary of a paid-up life insurance policy
 - _____ Gift of real estate (requires approval of GreenMount's Gift Acceptance Committee)
 - _____ Personal property, including art, personal collections, etc. (requires approval of GreenMount's Gift Acceptance Committee)

Designation: I would like my gift to support the following school initiative:

- Financial Aid
- Board Directed Reserve Fund
- Campus Improvement
- Wherever most needed
- The Fund for GreenMount
- Other: _____

You will be contacted to insure we can carry out your wishes.

Public

Recognition: May we publicly honor you as a member of The Waverly Circle so that others may be inspired to give through your example? Yes No

Would you be willing to share your personal story in one of our publications? Yes No

Attachments or letters that further describe the nature of the above provision(s) are welcome. By signing this form, I am informing The GreenMount School that the above provisions are in effect as of this date; however, there is no binding pledge intended or assumed.

Date: _____

Signature: _____

Please return to:

**Development Office ♦ 501 W. 30th Street ♦ Baltimore, MD 21211
410-235-6295 ♦ Extension 23**