



Heritage Society Planned Giving Intention Form

Name: _____ CMS Affiliation: _____

Address: _____ City: _____

State: _____ Zip: _____

Phone: _____ Email: _____

I would like to support the future well-being of Cardigan Mountain School and to encourage others to do likewise; therefore, I have made a provision for the School in my estate plans as follows:

_____ There is a charitable bequest in my will to benefit Cardigan Mountain School.
It consists of:

- A specific dollar amount.
- A percentage of my estate.
- The residue of my estate.

_____ Cardigan Mountain School is the beneficiary of my IRA or other retirement plan.

_____ Cardigan Mountain School is the beneficiary of:

- My charitable gift annuity.
- My charitable remainder trust.
- Other: _____

My expressed preference for the future use of this gift is:

- Unrestricted.
- Financial Aid.
- Endowment.
- Faculty Support.
- A named endowment fund. (Note: Minimum amount to create a named fund is \$100,000.)
- Other: _____

With your permission, we would like to include your name in our Heritage Society member listing, which appears in our Annual Report of Gifts and on a wall in the Cardigan Commons. Please indicate your preference for publishing your name.

_____ I would like others to be encouraged by my example; I give permission for my name to be published.

_____ I would be interested in sharing my story with the Cardigan Mountain School community.

_____ I would like to remain anonymous and prefer that my name not be published.

Signature: _____ Date: _____

Printed Name: _____

For the School's confidential records, please enclose a copy of your will or trust document, or the appropriate section(s) thereof, to ensure that your gift intentions are fulfilled. Please include cover page, applicable section mentioning Cardigan, and the signature page.

CMS Representative: _____ Date: _____

James Fenn, CMS Director of Business Operations