



STATEMENT OF INTENT - ESTATE GIFT

I/We wish to support the mission and activities of Brandeis Marin. Therefore, in addition to gifts previously made or that I/we may make in the future, I/we hereby declare that I/we have made provision for Brandeis Marin in my/our estate plan by:

- Specific bequest
- Percentage bequest
- Residual bequest
- Testamentary trust - *Brandeis Marin named an ultimate beneficiary*
- Life insurance, retirement account, or other instrument – Brandeis Marin named a beneficiary
- Other (please specify) _____

Estimated value of estate gift: \$ _____ (optional)

It is my/our intention, as expressed in the appropriate gift instrument, that Brandeis Marin use my/our estate gift in the following manner:

- Unrestricted support – Utilize wherever the school has a need at time of receipt.
- Restricted support:
 - Tuition Assistance
 - Scholarships
 - Specific School Program _____
 - General Endowment
 - Vanessa and Marty Friedman Fund
 - Jewish Studies
 - Eighth Grade Israel Trip
 - Capital Campaign
 - Other Project _____

WITNESS my/our signature(s) this _____ day of _____, 20__.

Print Name

Print Name

Signature

Signature

In order to assure Brandeis Marin’s ability to honor the wishes of our donors, we welcome for our permanent confidential records a copy of the appropriate sections(s) of your Last Will and Testament, revocable living trust, or other relevant documentation. For donors leaving a bequest to fund a restricted endowment, please consult with the Advancement Office to assure that we understand your intent. We also recommend the inclusion of the following language as optional, but suggested, in order to ensure that a bequest designated for a specific use will always remain productive if circumstances change unexpectedly: “If changed circumstances should at some future time make it impractical to continue using the income from the endowment for the purpose designated, then the Brandeis Marin may redesignate the purpose to adhere as closely as possible to my/our original intent.” Please return this completed form to: Brandeis Marin, Att: Barbara C. Harris, 180 N. San Pedro Rd. San Rafael, CA 94903