



MERCERSBURG ACADEMY

The Marshall and Irving Alliance

BEQUEST INTENTION

It is my/our pleasure to inform you that I/we have named Mercersburg Academy (Tax ID#: 23-1365963) as a beneficiary of an estate provision. This letter signifies my/our intention to make a bequest through my/our estate plan of approximately (current estimated value) \$ [REDACTED], with the understanding that this gift intention may change, I/we will inform you of any revisions to this provision.

PROVISION DETAIL

I/we have named Mercersburg Academy as a beneficiary of the following (check as many as apply). *Mercersburg would greatly appreciate a copy of your will or trust (or the appropriate sections thereof) for safekeeping in our confidential files. Thank you.*

- Will Trust Retirement account beneficiary Life insurance policy beneficiary
 Other (please describe):

[REDACTED]

This provision names Mercersburg Academy as:

- Primary beneficiary Secondary beneficiary
 Other contingent beneficiary:

[REDACTED]

Mercersburg Academy will receive this gift:

- Upon my death Upon the death of my surviving spouse/partner
 Other contingent beneficiary:

[REDACTED]

Estate contact information (optional) of executor or trustee (if your gift is through a will or trust) or administrating company (i.e., TIAA Fidelity, etc., if your gift is through a retirement account or life insurance policy):

Name: [REDACTED] Phone: [REDACTED]
Address: [REDACTED] Email: [REDACTED]
City, State: [REDACTED] ZIP: [REDACTED]

We appreciate that you are sharing your plans with Mercersburg Academy so the school can better understand, plan for, and celebrate your intent. All details remain confidential.

GIFT PURPOSE

- I/We have signed an agreement with Mercersburg Academy stating the designation or purpose for this gift (additional information):

[Redacted]

- I/We have not signed an agreement. Please use this future gift for the following (e.g., general purposes/area of greatest need, financial aid, a specific endowed fund, etc.). Provide percentages or specific amounts if the provision is to be split between multiple areas:

[Redacted]

[Redacted]

ACKNOWLEDGEMENT

May Mercersburg Academy publish your name(s) without dollar amounts in the Marshall and Irving Alliance member listings?

- Yes, please list my/our name(s) as follows: [Redacted]
- No, I/we wish to remain anonymous and request that my/our name(s) not be published in connection with my/our bequest intention.

Signature: [Redacted]

Printed name and class year: [Redacted] Date: [Redacted]

Signature: [Redacted]

Printed name and class year: [Redacted] Date: [Redacted]

Address: [Redacted] Email: [Redacted]

City, State: [Redacted] ZIP: [Redacted]

PLEASE RETURN TO:

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