

Registry of a Charitable Estate Commitment



Donor(s) Name:

Phone:

Address:

Email:

Class Year / Hill Affiliation:

Birthdate:

In appreciation of and gratitude to The Hill School, and with the desire to contribute to its continued strength and success, I have made provisions in my estate plan for a charitable gift to The Hill School. A conservative estimate of the current value of the charitable gift is:

\$

I intend my charitable estate commitment to be used for the following purpose(s). Indicate % if selecting more than one option.

- | | |
|---|---|
| ☐ The greatest needs of The Hill School <input type="text"/> % | ☐ Financial aid endowment <input type="text"/> % |
| ☐ Unrestricted endowment <input type="text"/> % | ☐ Teaching faculty compensation endowment <input type="text"/> % |
| ☐ Other/Existing endowed fund: <input type="text"/> % | |

The Hill will receive my charitable estate gift:

- ☐ Upon my passing ☐ Upon the passing of my surviving spouse/partner/other designee (Please name):
- ☐ Contingent upon other life circumstance (Please describe):

The charitable estate commitment is made through the following gift vehicles (please check all that apply):

Life Insurance:

Whole Life: ☐ a. Donor Owned ☐ b. Hill Owned

Term Life: ☐ a. Donor Owned ☐ b. Hill Owned

Charitable Remainder Trust:

- ☐ Charitable Remainder Unitrust
- ☐ Charitable Remainder Annuity Trust
- ☐ Charitable Lead Unitrust
- ☐ Charitable Lead Annuity Trust

Bequests:

- ☐ Direct Dollar Designation
- ☐ Percentage of estate
- ☐ Contingent upon spouse/family member/life circumstance
- ☐ Residual from estate

Retirement Plans:

- ☐ 401k ☐ 403b (check one)
- ☐ IRA
- ☐ Pension

☐ **Revocable Living Trust**

The Hill School and I understand that this Registry of a Charitable Estate Commitment is revocable and not a contractual obligation or a debt of my estate. I will, however, receive gift credit in the amount of the current net present value of the charitable commitment I provided, depending upon my age at the time of this Registry. I understand that The Hill School may rely on this Registry and may, therefore, carry on or expand its educational program on the basis of this Registry. If my intentions change, I will inform The Hill School.

Documentation (optional): ☐ I have included documentation that outlines my charitable estate commitment to The Hill.

Gift Impact (optional): Upon my passing, I would like the impact of my estate gift to be shared with the following people (include full name and contact information – address, email, and/or phone).

Please sign manually or electronically.
By signing this electronically, I agree this electronic signature is the legal equivalent of my manual signature.

Donor(s)Date

Accepted with gratitude and appreciation.

Christian P. Sockel P’22
Assistant Head of School for
Institutional Giving
The Hill School

Date