

Thank you for your generous commitment to Moses Brown School. Your legacy gift enables you to create a lasting impact, to support the mission of MB, and make a difference in the lives of future generations of students.

Please take a moment to complete this form and return it to us so we can better understand your intentions for your gift. The information you provide is not legally binding, and we understand that you may wish to change your gift in the future.

Name(s): \_\_\_\_\_

Year(s) of Birth \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

*You will receive occasional email updates from Moses Brown. We will not sell, rent, or exchange your email address.*

## ABOUT YOUR GIFT

If you are willing to disclose more information about your gift, Please check all that apply and estimate the value of each gift in today's dollars.

- ☐ Will: \$ \_\_\_\_\_
- ☐ Revocable Living Trust: \$ \_\_\_\_\_
- ☐ Charitable Remainder Trust: \$ \_\_\_\_\_
- ☐ Insurance Policy: \$ \_\_\_\_\_
- ☐ Beneficiary of your DAF: \$ \_\_\_\_\_
- ☐ Retirement Plan/IRA: \$ \_\_\_\_\_
- ☐ Real Estate: \$ \_\_\_\_\_
- ☐ Qualified Charitable Distribution (QCD): \_\_\_\_\_
- ☐ Other Assets: \$ \_\_\_\_\_

To ensure your gift is used as you intend, please provide Moses Brown with a copy of the section of your will or other document pertaining to your gift. Sample language is shared below on page two of this document for will bequests.

**General Bequest Language**

*"I give (a specific asset) or (\_\_\_\_% of the rest, residue, and remainder of my estate) to Moses Brown School Foundation (EIN# 05-0258906), located in Providence, RI, for its general use and purposes."*

**Bequest Language for a Specific Purpose**

*"I give (\$\_\_\_\_\_) or (a specific asset) or (\_\_\_\_% of the rest, residue, and remainder of my estate) to Moses Brown School Foundation (EIN# 05-0258906), located in Providence, RI, to be used for the following purpose: (for example, to establish an endowed scholarship fund or support an academic program)."it card, or donate online.*

**ADDITIONAL INFORMATION**

Is your gift contingent? ☐ Yes ☐ No If yes, please explain:

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**HOW WOULD YOU LIKE TO BE RECOGNIZED?**

☐ I/We would like to be listed as Obadiah Brown Society Member(s), which may include listing of my/our gift with a dollar range. Please list my/our name(s) as: \_\_\_\_\_

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☐ I/We prefer that my/our gift not be listed within a dollar range, but you may list my/our name(s) as Obadiah Brown Society Member(s). Please list my/our names as: \_\_\_\_\_

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☐ I/We wish to remain anonymous for this gift.

Signature(s):

\_\_\_\_\_ Date: \_\_\_\_\_

Thank you for your thoughtful investment in the future of Moses Brown School. As with any of your decisions involving your estate, we recommend that you seek the advice of professional counsel. Your signature verifies only that the information above is accurate. This document in no way binds you to your commitment.

**Please return to:** Meredith Carlone, Director of Leadership Giving  
Moses Brown School  
Advancement Office  
250 Lloyd Ave.  
Providence, Rhode Island 02906  
mcarlone@mosesbrown.org | O: 401-831-7350 x235 | C: 401-678-0347