



JamesLloydBreck
Society BRECK SCHOOL

Letter of Intent for a Future Gift

I/We hereby inform you that a legacy gift for Breck School is included in my/our estate or other financial plans. I/We understand that this commitment is revocable and can be modified by me/us at any time.

Name(s)

Address

City

State

Zip

Phone

Email

It is my/our intent to leave a legacy for the benefit of Breck School:

- Will IRA/Retirement Plan Life Insurance
- Trust Charitable Remainder Trust Other _____

I/we wish to inform Breck School, for long-term planning purposes, that as of this date, the value of my/our gift is: \$ _____.* [Note: If your gift is a percentage of your estate, please indicate the approximate present value of that percentage.] I/we understand that, by stating an amount, my/our estate is not legally bound by this statement, and I/we may choose to increase, decrease, or revoke this bequest at any time.

Designation: I/We want this gift to be used for the benefit of the following department, endowment or program, or where the need is greatest:

Please enroll me/us in the James Lloyd Breck Society, as follows:

- You may publish my/our name(s)** as James Lloyd Breck Society member(s) as a motivation for others to leave a future gift to benefit Breck School.
- Please do not publish my/our names** in a roster of James Lloyd Breck Society members.
- Please do **not** enroll me/us in the James Lloyd Breck Society

* We hope that you will share the approximate amount of your gift with us so that the benefiting department, endowment or program will know of your generosity, recognize you appropriately, and be better able to plan for the future. To help us be good stewards of your future gift, please attach supporting documentation of your legacy intention. The documentation will be stored in our confidential records. Thank You!

Date

Donor Signature and Date of Birth

Donor Signature and Date of Birth