Stewarding Friends Through Planned Giving

Planned giving has played an important role in the Friends School community for nearly 100 years, providing vital support for financial assistance, faculty professional development and programming.

Did you know...

- Planned gifts are realized in the future and do not impact your current finances.
- Gifts of all sizes make an impact on the School.
- You may be able to more fully achieve your philanthropic goals, because a planned gift is often larger than an outright gift.
- If you are in the 50th reunion or above, a planned gift will count in your class gift effort, increasing participation and the giving total.
- If you make a planned gift, you become a member of the *Circle of Friends*, along with several 100 other alumni, trustees and friends who want to make a difference at the School.

Since 2009, planned gifts have generated more than $3 million in revenue, including a $1.8 million bequest - the single largest gift ever received by the School.

Establishing a planned gift can be straightforward...

STEP 1 Decide what type of planned gift is right for you.

- Include Friends in your will. If you already have a will, you can modify it to add the School by using a codicil. Sample codicil language may be found on the Friends School website at friendsbalt.plannedgiving.org.
- Make Friends a beneficiary of your IRA, 401K or life insurance plan. Contact your individual provider for the correct forms. Many forms require the School's Federal Tax ID # 52-0591602.
- There are other more complex planned gifts that may be right for you and your family. Some may require input or support from an attorney or financial advisor. If you are interested in learning about some of these options, contact Jocelyn Kehl.

STEP 2 Designate your gift.

- Planned gifts that are not specifically designated by the donor are invested in the Memorial Endowment Fund, which provides flexible funds to support areas of greatest need.
- If you are interested in establishing a new named endowment or wish your planned gift to support a particular purpose, contact Jocelyn Kehl.

STEP 3 Let us know about your gift.

- Please fill out a Declaration of Intent form (other side) and send it to Jocelyn Kehl or, if you are already on campus, drop it off in the Development Office.

Thank you!

Jocelyn Kehl •Director of Major & Planned Giving
410-649-3316 • jkehl@friendsbalt.org
5114 North Charles Street • Baltimore, MD 21210

Friends School Declaration of Intent

As an expression of my commitment to the mission of Friends School of Baltimore, I/we have included the School in the following estate provisions:

- ☐ Will
- ☐ Trust
- ☐ Charitable Remainder Trust
- ☐ IRA/Other Retirement Assets
- ☐ Chartiable Gift Annuity
- ☐ Life Insurance Policy
- ☐ Pooled Income Fund
- ☐ Other (please describe below)

The estimated value of my/our gift is _____. My/our gift is _____% of the assets indicated above.

Other/ Additional Details: _____

_____

_____

☐ I/We have included a copy of the portion of my estate document that names Friends School of Baltimore as a beneficiary. I understand that it will be kept confidential.

Although optional, the following information is helpful:

Attorney's Name: _____ Firm Name: _____
Address:_____
Phone: _____ Fax: _____ Email: _____

I wish to direct my/our support to the following:

☐ Where Friends School of Baltimore's needs are greatest.

☐ Other: _____

Recognition:

☐ I/We give permission to list my/our name(s) as a member of the *Circle of Friends* (for recognition purposes only) with the understanding that the amount of my arrangement is strictly confidential.

☐ I/We prefer to be an anonymous member of the *Circle of Friends*.

Though this is an expression of my/our current plans, I understand that it is not a legal obligation and is non-binding. I/We may modify or revoke these plans at any time.

Donor(s) Printed Name(s): _____
Donor Signature: _____ Date: _____
Spouse/Partner Signature (if joint): _____ Date: _____
Address: _____
City: _____ State: _____ Zip: _____
Email: _____ Phone: _____