



# HEWITT

## NON-BINDING DECLARATION OF FUTURE INTENT

Thank you for your intention to include The Hewitt School in your estate plan. We ask that you complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential (if you wish), and does not create a binding obligation.

\_\_\_ **New Intention**

\_\_\_ **Updated Intention**

Name (*print*): \_\_\_\_\_ Class Year (*if applicable*) \_\_\_\_\_

Spouse name (*if joint gift*): \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

**Gift Information:** I/We have provided a gift to The Hewitt School as set forth in my/our:

Will or Trust

Life Insurance Policy

Charitable

Remainder Unitrust

Charitable Gift

Annuity

Retirement Plan or

Beneficiary

Designation (401(k),

403(B), IRA, Keogh,

Brokerage Account)

Other Asset(s)

(please describe):

\_\_\_\_\_

\_\_\_\_\_

The Hewitt School is a contingent beneficiary of the indicated asset above (please explain):

\_\_\_\_\_

The current estimated value of my/our gift is \$ \_\_\_\_\_ . My/Our gift is

\_\_\_\_\_ % of the asset indicated above. If a percentage is given, what is the current

estimated value of the percent in today's dollars \$ \_\_\_\_\_ .

**Gift Purpose:**

Gift Agreement/Letter - I/We have signed a Gift Letter or Agreement with The Hewitt School stating the designation or purpose for this gift.

I/We have not signed a Gift Letter or Agreement. It is my/our intention that The Hewitt School use this future gift for (briefly describe the program or fund you would like your gift to benefit. For example, Unrestricted (Area of Greatest Need), Financial Aid, Faculty

Support, Performing Arts, Athletics, Research, Endowment. If multiple areas, please provide percentages or specific amounts):

\_\_\_\_\_  
\_\_\_\_\_

**Recognition:** Donors who provide a planned gift to benefit The Hewitt School will be enrolled in The Daffodil Society.

- I/we prefer no public recognition
- Please list my/our name(s) as follows:

\_\_\_\_\_

**Estate Contact Information:** Although optional, the following information is very helpful.

**Executor, Trustee (if your gift is through a Will, Trust):**

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

**Administrating Company (ie. TIAA, Fidelity, etc., if your gift is through a retirement account or life insurance policy):**

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

**Additional Contact/Relationship you may want us to know (family, attorney, etc.)**

Name: \_\_\_\_\_ Relation: \_\_\_\_\_  
 Address: \_\_\_\_\_ City, State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Email: \_\_\_\_\_

I/We understand this form does not create a binding obligation and any details about my/our gift will remain confidential. The Hewitt School understands that the size of my/our future gift may change.

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

Spouse Signature (if joint): \_\_\_\_\_ Date: \_\_\_\_\_

Please return to: The Advancement Office, The Hewitt School, 45 East 75 th Street, New York, NY 10021 or [advancement@hewittschool.org](mailto:advancement@hewittschool.org).