

THE HERITAGE SOCIETY

The Cardinal Spellman High School Heritage Society honors alumni and friends whose planning demonstrates their love for our school and our students. Spellman established the *Heritage Society* to thank the generous donors who support its future through a planned gift. We welcome members through a gift by will, retirement plan, life-income vehicle, or other planned gift. Such a gift may be the perfect way to do more for Spellman than ever thought possible.

MEMBERS:

Estate of Claire M. Appling

Dr. Patrick Brophy '74

Mr. Gary W. Brusseau '69

Mr. Barry C. Cosgrove '75

Tina and Dave Curtin PP '06

Mr. Michael S. Dillis '76

Estate of Mary Josephine Donovan

Matthew '75 and Karen Glynn

Edward J. Hamelin, Jr. '83

Estate of Mary E. Lambert

Estate of Rev. William McConnell

Estate of Robert J. McEwan

Estate of Margaret Murphy

Mr. Stephen Prone

Estate of Margaret Smith

Patrice A. Sweeney '65

Bruce Thompson '63

Thomas C. Truelson '63

Sr. James Frances, CSJ, Trust

Estate of Edward J. and Katherine A. Waitt

To discuss planned giving options please call
Aimee Wetzel, Associate Head of School for
External Affairs at **508.584.3004** or
awetzel@spellman.com



Legal Name: Cardinal Spellman High School

Federal Tax ID # 56-2438550



CARDINAL SPELLMAN
HIGH SCHOOL



Planned Giving

Leave a lasting legacy to
Cardinal Spellman High School





Why Your Legacy Matters

As a valued member of our alumni family, your journey helped shape the spirit and story of our school. Now, you have the opportunity to ensure that future generations experience the same transformative education and community that meant so much to you.

A planned gift is more than a financial contribution — it's a legacy of faith, values, and excellence. Your generosity will support scholarships, academic programs, and spiritual formation for students who will walk the same halls, strive for the same ideals, and carry our mission forward into the world.

By including our school in your estate plans, you become a lasting part of something greater than yourself. You help secure the future of Catholic education, and you inspire others to do the same.

Ways to Make a Planned Gift

- **Bequest:** Include Spellman in your will or trust.
- **Beneficiary Designation:** Name Spellman on your retirement plan, life insurance, or bank account.
- **Charitable Gift Annuity:** Give now, receive lifetime income, support Spellman later.
- **Charitable Trust:** Provide income to yourself or others, with the remainder going to Spellman.
- **Donor-Advised Fund:** Recommend grants to Spellman from your fund.
- **Gifts of Assets:** Donate stocks, real estate, or other valuables for tax benefits.

**Please speak to your financial advisor for best ways to plan your gift*

Changing Lives

“Spellman meant everything to Lindsay, and we want her scholarship to exist in perpetuity long after Dave and I are gone. We are pleased to offer the proceeds of our estate to benefit future Spellman students.”

— Tina and David Curtin PP '06

“Being at that tender age of Life Review and Estate/Legacy Planning – I felt compelled to step up and do my part to continue the tremendous contribution that Spellman has made to the lives of the students and families of Southeastern Massachusetts. I see planned giving as an opportunity for me to pay it forward – to care for and about the generations to come.”

— Bruce Thompson '63

