



Heritage Society Planned Giving Intention Form

Name: _____ CMS Affiliation: _____

Address: _____ City: _____

State: _____ Zip: _____

Phone: _____ Email: _____

I would like to support the future well-being of Cardigan Mountain School and to encourage others to do likewise; therefore, I have made a provision for the School in my estate plans as follows:

_____ There is a charitable bequest in my will to benefit Cardigan Mountain School.
It consists of:

- A specific dollar amount: \$ _____
- A percentage of my estate.
- The residue of my estate.
- Other _____

_____ Cardigan Mountain School is a/the beneficiary of:

- My charitable gift annuity.
- My charitable remainder trust.
- An insurance policy.
- My IRA or other retirement plan
- Other: _____.

My expressed preference for the future use of this gift is:

- | | |
|---|--|
| <input type="checkbox"/> General Use - Unrestricted | <input type="checkbox"/> A named endowment fund: _____ |
| <input type="checkbox"/> Endowment: | (Note: Minimum amount |
| <input type="checkbox"/> Financial Aid | to create a named fund is \$100,000.) |
| <input type="checkbox"/> Academic Programs. | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Faculty Support | |

With your permission, we would like to include your name in our Heritage Society member listing, which appears in our Annual Report of Gifts, on Cardigan's website, and on a plaque in the Cardigan Commons. Please indicate your preference for publishing your name.

- _____ I would like others to be encouraged by my example; I give permission for my name to be published.
- _____ I would be interested in sharing a testimonial with the Cardigan Mountain School community.
- _____ I would like to remain anonymous and prefer that my name not be published.

Printed name as you would like it to appear: _____

Signature: _____ Date: _____

If you are comfortable doing so, please enclose copies of the cover page, applicable section mentioning Cardigan, and the signature page of your will or trust document, or the appropriate section(s) thereof, to ensure that your gift intentions are fulfilled. These will be filed with the School's confidential records.

CMS Representative: _____ Date: _____

Jeremiah Shipman '00, Director of the Annual Fund and Planned Giving
Cardigan Mountain School, 62 Alumni Drive, Canaan, NH 03741