



## Planned Gift Intentions Form

By completing this form, you signify your intention to name Rutgers Preparatory School as a beneficiary of your estate and your wish to become a member of the Legacy Circle, which honors those who have made legacy gifts to Rutgers Prep. Rutgers Prep understands that this is not a contract and not legally binding on your estate(s). We are deeply grateful for your vision and generosity.

**I/we have named Rutgers Preparatory School as a beneficiary of (check all that apply):**

- Last Will and Testament
- Retirement Account
- Revocable Living Trust
- Charitable Trust (Type of Trust: \_\_\_\_\_)
- Life Insurance Policy (Policy Type: \_\_\_\_\_)
- Donor-Advised Fund (Sponsor Name: \_\_\_\_\_)
- Other (please specify) \_\_\_\_\_

**My/our provision(s) names Rutgers Preparatory School as:**

- Primary Beneficiary
- Secondary Beneficiary
- Contingent Beneficiary
- Other (please specify) \_\_\_\_\_

**I estimate that the total value of my/our planned gift to Rutgers Preparatory School through my/our estate will be \$ \_\_\_\_\_ or \_\_\_\_\_ % (and the current approximate value of this \_\_\_\_\_ % is \$ \_\_\_\_\_).**

**If/when this gift is received by Rutgers Preparatory School, it is my/our wish that the School use my/our gift for the following purpose (Note: An unrestricted gift provides the School with an opportunity to allocate funds in a timely way where need is greatest):**

- General Purposes/Areas of Greatest Need
- Scholarship/Financial Aid
- Other \_\_\_\_\_

**I/we understand that my/our commitment to leave Rutgers Preparatory School a legacy gift entitles me/us to enrollment in the Rutgers Prep Legacy Circle and special recognition during events and in publications.**

- Yes, Rutgers Prep may publish my/our name(s) as member or member(s) of the Legacy Circle.
- I am/we are pleased to become a member of the Legacy Circle, but I/we wish to remain anonymous and request that my/our name(s) not be published in connection with my/our intentions.

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**Signature, Printed Name, Date**

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**Signature, Printed Name, Date**

**Professional Advisor Contact Information (if applicable):**

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Thank you for your meaningful commitment to Rutgers Preparatory School. Should you have any questions about your intentions, please contact Susan Gantz, Director of Development, at [gantz@rutgersprep.org](mailto:gantz@rutgersprep.org).