



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are pleased to become a member of the Legacy Circle, but I/we wish to remain anonymous and request that my/our name(s) not be published in connection with my/our intentions.

Signature, Printed Name, Date

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.