



Thank you for including Collingwood School in your estate planning.

In strict confidence, we invite you to share with us information about your legacy gift. By letting us know of your plans, we can thank you during your life, and confirm that we are able to fulfill your stated intentions.

Please know that completing this form is non-binding — we understand that you may change your plans at any time. We thank you for considering our school in your future plans - affirming your belief in the power of education and the values that shaped your connection to our School. A legacy gift ensures that your support for Collingwood carries forward, creating opportunity and impact for generations to come.

Planned Gift Information

Personal information

Name:

Relation to School:

Spouse Name:

Address:

City:

Province:

Postal Code:

Phone:

Email:

Date(s) of Birth:

Please provide the following information and attach a copy of the documentation or appropriate language from your will or trust, if available.

Collingwood School offers the following sample language for planned gifts:

- **Bequest in a Will or Trust**

- *"I give and bequeath to Collingwood School Foundation, a registered charity (Charitable Registration Number: BN 86868 0760 RR0001) located in West Vancouver, BC, the sum of \$_____ (or _____% of my estate, or the residue of my estate) to be added to the Collingwood School Endowment Fund, to support the long-term sustainability and excellence of the school."*

- **Restricted Gift Language**

- If donors wish to designate their gift toward a specific area, they may use the following language:
- *"I wish for my gift to be directed toward [Building Improvement, Faculty Support, or Greatest Needs] at Collingwood School. If, at the time of my gift, these needs have been met or are no longer a priority, I authorize the Board of Governors to use the funds for the school's greatest benefit."*
- *"If Collingwood School Foundation is unable to use this gift for the intended purpose, the Board of Governors may direct the funds toward the school's most pressing needs, ensuring that my legacy supports the ongoing success of Collingwood School."*

• **Gift of Life Insurance**

- *"I designate Collingwood School Foundation as the beneficiary (or owner and beneficiary) of my life insurance policy with a face value of \$_____. This gift is to be directed to the Collingwood School Endowment Fund to ensure long-term impact."*

• **RRSPs/RRIFs Beneficiary Designation**

- *"I designate Collingwood School Foundation as the beneficiary of my Registered Retirement Savings Plan (RRSP) or Registered Retirement Income Fund (RRIF). It is my preference that these funds be added to the Endowment Fund to provide lasting support to the school."*

• **Charitable Remainder Trust**

- *"Upon my passing (or the passing of my named beneficiary), all remaining assets in my Charitable Remainder Trust shall be distributed to Collingwood School Foundation (Charitable Registration Number: BN 86868 0760 RR0001) to support the Collingwood School Endowment Fund."*

Please complete all that apply.

I/We have named Collingwood School as a Beneficiary:

Select all that apply

Will or Trust

Other (please specify):

Life Insurance Policy

RRSPs, RRIFs, or TFSAs

My/Our Gift is:

Select one

A Percentage (____%) of my/our estate approximately valued at \$

Stated amount of \$

My/Our Gift Designation:

Priority Giving, unrestricted support to the greatest need of the School.

Unrestricted general giving allows us to address our community's most urgent needs.

100% to Priority Giving

____% to Priority Giving, the balance as indicated in Specific Intent.

Specific Intent, to be used towards the following:

____% to Specific Intent, as indicated below.

Campus:

Program:

Other Instructions:

I/We understand with a specific intent gift, the requested use of my gift is subject to the eventual approval by Collingwood School.

In Recognition

All donors of legacy gifts qualify for inclusion and recognition in The Collingwood Legacy Circle, a group of generous and forward-thinking donors who believe in shaping the future of our School. We deeply appreciate your gift and wish to acknowledge your intention in a way that is meaningful to you.

Legacy Circle members receive:

- Invitations to recognition events and community gatherings
- Personal updates on Collingwood's evolving vision and priorities
- The option to be recognized in publications (or remain anonymous — your choice)
- A thoughtful approach to stewarding your intentions over time

Please indicate your recognition preferences:

Yes, please include me in The Collingwood Legacy Circle and acknowledge my gift in the annual report. My name should appear as follows:

Yes, please include me in The Collingwood Legacy Circle but do not publicly recognize me in the annual report. I wish to remain anonymous.

I / We understand this form is not a legal or binding commitment. All information will be held in strict confidence. Collingwood School understands that the size and profile of my/our future gift may ultimately be different than stated on this document.

Donor's Signature:

Date:

Print Name:

Joint Donor's Signature:

Date:

Joint Donor (Print Name):

Please return this form to:

Advancement Team

Email: advancement@collingwood.org

Phone: 604-925-3331 ext. 2293

Address: 70 Morven Drive, West Vancouver, BC, V7S 1B2

For any questions, please contact:

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