



## Georgetown Day School **LEGACY GIVING**

Since 1945, Georgetown Day School has been a place where children love to learn and learn to change the world. For 80 years, GDS students have been joyfully engaged, meaningfully challenged, and prepared to lead lives of purpose — locally, nationally, and globally.

**By including GDS in your estate plans, you create a lasting impact on our future and join the Gladys Stern Legacy Society. Legacy gifts help ensure that the values you cherish at GDS will continue to inspire generations of students who love learning and are dedicated to social justice.**



During her 42 years of service at Georgetown Day School, Gladys Stern helped shape the lives of more than 4,000 students — including nearly 2,000 graduates from the high school she helped establish. These students received a rigorous education that prepared them for a lifetime of learning and instilled in them an appreciation for the world and its opportunities. The legacies of Gladys and GDS will be forever intertwined.

“We were excited to hear about the **Gladys Stern Legacy Society**. Planned giving provides us with a convenient way to support the long term viability of GDS, which has given our children, and is now giving our grandchildren, such a wonderful place to grow and learn.”

- Sue Schaffer and Mike Rogan, Parents of Sarah '00, Elizabeth '01, Matthew '04 and Grandparents of Aileen '35 and Ella '37



## BEQUESTS

Including Georgetown Day School in your will is one of the easiest and most meaningful ways to leave a legacy. A bequest allows you to:

- Support GDS while keeping full control of your assets during your lifetime.
- Retain flexibility should your circumstances change.
- Know that your gift — large or small — will strengthen GDS for generations to come.

### SAMPLE LANGUAGE FOR YOUR ESTATE PLANS:

#### General Bequest:

“I give to Georgetown Day School, Inc., 4200 Davenport Street, NW, Washington, DC 20016, a nonprofit corporation, or its successor, EIN 53-0204701, the sum of \$\_\_\_\_\_.”

#### Specific Bequest:

“I give to Georgetown Day School, Inc., 4200 Davenport Street, NW, Washington, DC 20016, a nonprofit corporation, or its successor, EIN 53-0204701, [describe the property].”

#### Residuary Bequest:

“I give to Georgetown Day School, Inc., 4200 Davenport Street, NW, Washington, DC 20016, a nonprofit corporation, or its successor, EIN 53-0204701, all [or a portion] of the rest, residue, and remainder of my estate.”



## BENEFICIARY DESIGNATIONS

Another simple way to make a gift to Georgetown Day School is to designate the School as the beneficiary of your assets at the end of your lifetime. You can specify all or a percentage of the assets you wish each beneficiary to receive — often by simply filling out a form.

You may consider beneficiary designations for the following assets:

### RETIREMENT ACCOUNT ASSETS

- Instead of modifying your will or living trust, you can name Georgetown Day School as the beneficiary of your retirement account by completing a form with your plan administrator.
- This option is highly tax-efficient. Retirement assets left to individuals are subject to income tax when distributed, potentially pushing heirs into higher tax brackets. If left to GDS, a tax-exempt organization, 100% of your retirement assets go directly to support our mission.
- Many donors choose to leave other assets (cash, securities, real estate) to family members and designate retirement assets to GDS.

### LIFE INSURANCE POLICIES

- You can name Georgetown Day School as the beneficiary of all or part of the death benefit on your life insurance policy by completing a simple form with your insurance company.

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“We are delighted to have made a legacy gift to GDS as part of our estate planning. Our family became part of the GDS community in the late 1980s. GDS encouraged our children to think for themselves, to speak up, and to care about making the world a better place. The school had a profound impact on them — so much so, that our daughter has enrolled her kids in GDS. After all these years, we are happy to see that the values we cared about have remained constant.”

- **Laura Stone and Ezra Levine, Parents of Matthew '99, Elizabeth '02 and Grandparents of Elena '37**

- Alternatively, you may transfer ownership of the policy to GDS. Doing so may provide an immediate income tax deduction for the policy's value and future deductions if you continue to pay premiums.

### BANK OR INVESTMENT ACCOUNTS

- Another no-cost option is to designate Georgetown Day School as the beneficiary of a bank or investment account. You may instruct your financial institution to transfer all or part of the assets in your account directly to GDS upon your passing.
- This approach allows you to maintain complete control of your assets during your lifetime while ensuring a lasting gift to GDS.

*If you'd like to learn more about a specific type of giving — or explore other giving options — we'd be happy to help. Please reach out to a member of the GDS Advancement team.*

“[We made estate gifts to] the places that we felt made a major impact in our lives. I talk to my kids and nauseam about this decision because I view it as part of their financial literacy... At some point, we began to realize that we would have the assets we needed [in retirement], and we started thinking about the places that have given our family a major lift in life. We hope those places will do the same for others over time. That’s what really resonated with us as we thought about how to put our resources to good use.”

- Jim Hamos, Parent of Leah '04



## SHARE WITH US

By sharing your plans to include Georgetown Day School in your estate, you help us plan for the future — and give us the joy of thanking and celebrating you during your lifetime. Being recognized as a member of the Gladys Stern Legacy Society also inspires others to make a similar commitment.

If you have already made a commitment to GDS in your estate plans, please let us know by filling out our **enrollment form**.

### To learn more, contact:

*If you wish to support a particular program, we ask that you contact our Advancement Office. Our legal name should appear as Georgetown Day School, Inc. The institution’s Federal Tax ID number is 53-0204701.*



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