



The Cole Society for Legacy Giving

Thank you for indicating that you have arranged to support Carroll in your charitable estate plans. For recognition and planning purposes, please complete this member profile.

Name(s): _____

Date(s) of Birth: _____

**Documented legacy intentions from donors aged 65+ may be able to be counted towards Carroll's fundraising totals.*

Recognition Preferences: May we include your name in our list of Cole Society members in our *Celebration of Giving* and other School publications?

- Yes, my/our name(s) can be listed.
- No, I/we prefer to be anonymous

(Optional) Please tell us more about your estate provision for Carroll. We recognize that this gift may change and this form is not a legally binding pledge.

I/We have included Carroll in my/our:

- Will or living trust
- Individual Retirement Account (IRA)
- Life Insurance Policy
- Other (please specify) _____

I/We estimate the current value of my/our gift at \$ _____

My/our intention is for Carroll School to allocate my gift as follows:

- Unrestricted /Area of Greatest Need
- Restricted for the purpose of _____

Other notes/comments: _____

For any questions, please contact: Jordyn Rappaport, Director of Leadership Giving

jrappaport@carrollschool.org; 781-314-9736