Thayer Academy

Estate Intention Form

The Southworth Society is named in honor of Dr. Stacy Southworth, Headmaster of Thayer Academy from 1920 -1948. The Southworth Society honors those benefactors of Thayer Academy who have decided to support Thayer in their estate plans.

By providing documentation of the part of your estate plan that benefits Thayer Academy, we may value your future gift for strategic planning and/or campaign purposes. We may also acknowledge your commitment properly. Please provide the following information about your future gift through your will or other planned gift arrangement. This is a confidential document.

I/We understand that making this commitment may be an incentive for others to do the same, and I/we would like my/our name(s) to appear as follows:

_____ I/We prefer to remain anonymous

I/We am/are providing for the future of Thayer Academy through: (check all that apply)

___Charitable Remainder Trust
___Charitable Gift Annuity
___Bequest in Will
___Retirement Plan (IRA, 401K, etc)
___Revocable Lifetime trust
___Life Insurance
___Life Estate
___Charitable Lead Trust
___Other (please specify)_____

Please check one of the next three options:

___I/We am/are currently in the process of working with my/our advisor/attorney to draft my/our Will or planned gift(s) agreement.

___I/We have enclosed a copy of the Will(s) provision(s) and/or planned gift(s) agreement(s) pertaining to Thayer Academy.

___Thayer Academy already has a copy of my/our Will(s) provisions and/or planned gift(s) agreement(s) to The Academy.

Please check any of the next three that apply:

___I/We have enclosed a copy of the executed designation form (IRA, 401K)

___My/Our Will(s) or agreement(s), was/were established and signed. My/Our Will(s) or agreement(s) provide(s) that _____% shall be distributed to Thayer Academy. As of today's date, the estimated value of this/these provision(s) is/are approximately $_____.

___My/Our Will(s) or planned gift agreement(s) provide(s) that a specific monetary amount shall be bequeathed or distributed to Thayer Academy. The current value is: $_____.

Please check one of the next two options:

____My/Our Will(s)/Planned Gift Agreement(s) indicate(s) the bequest(s) is/are not restricted.

-or-

____My/Our Will(s)/Planned Gift Agreement(s) direct(s) Thayer Academy to use the distribution(s) as follows:

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

I understand that I am not making a legal or binding commitment upon my estate by submitting this Estate Intention Form. Further, Thayer Academy should understand that the size of my future gift may be significantly different from the amount estimated here for valuation purposes in any campaign. If, for any reason in the future, Thayer Academy is no longer included in my estate plan, I will notify Thayer Academy so that the Academy can update their records, and remove me/us from the Southworth Society membership list.

Name_____ Date of Birth_____/_____/_____

Address_____

Preferred Email_____

Preferred Phone_____

Class Year (if applicable) _____

Spouse/Partner:

Name_____ Date of Birth_____/_____/_____

Address_____

Preferred Email_____

Preferred Phone_____

Class Year (if applicable) _____

_____ _____

Southworth Society Member 1 Signature **Southworth Society** member 2 Signature

_____ _____

Date Date

Please mail or email the completed form to:

Rachael Rouvales Vassalotti ’79 P ’07, ’11, ‘12
Director of Major and Planned Giving
Thayer Academy
745 Washington Street
Braintree, MA 02184
(781) 664-2504
rvassalotti@thayer.org

A planned gift can offer the opportunity to support Thayer while creating a personal and meaningful legacy. Contact us to learn more about the many different options for planned giving so that we may assist you in making the gift that's best for you.

To discuss a planned gift to Thayer Academy, please contact Director of Major and Planned Giving, Rachael Rouvales Vassalotti ‘79 P ‘07, ‘11, ‘12 rvassalotti@thayer.org