

Planned Giving Statement of Intent

The Heritage Society of North Shore Country Day recognizes and honors individuals who have chosen to support the school's future through a planned gift or bequest. We invite you to join this tradition of extraordinary generosity by including North Shore in your estate plans, helping to ensure the long-term strength and vitality of the institution for generations to come.

STATEMENT OF INTENT

As an indication of my commitment to the school, I have made the following provisions:

- | | |
|---|---|
| ☐ Bequest | ☐ Charitable trust beneficiary |
| ☐ Insurance policy beneficiary | ☐ Other _____ |
| ☐ Retirement plan beneficiary | |

Description of Gift (optional): _____

Approximate Gift Amount (optional): _____

This Gift Should Be:

- ☐ Unrestricted
- ☐ Restricted to support the following program(s) _____
- ☐ Used to build an existing restricted endowment or scholarship _____
- ☐ Used to create a new named endowment (min. \$100,000) _____

ACKNOWLEDGMENT

- ☐ North Shore Country Day is authorized to list my/our name(s) as follows: _____
- ☐ I have made provisions for a gift but prefer to remain anonymous

I understand that this "Statement of Intent" is not binding in any way. Rather, it is intended to aid North Shore Country Day in recognizing its donors, helping to better serve the school, planning for future organizational needs and, most importantly, implementing my/our wishes.

Print Name

Signature

Print Name

Signature