



The Cooper Society

A Lasting Legacy

When Leila and Mabel Cooper founded Berkeley Hall in 1911, they set out to ‘put the student first’ with the simple but profound motto: ‘No Limits, No Labels, and Lots of Love.’ Today, more than 100 years later, the spirit of the Cooper sisters lives on—sustained by generations of generosity and by a community that continues to believe in the unlimited, God-given potential of every student.

Become part of The Cooper Society by making a provision in your estate plans to provide for the ongoing success of Berkeley Hall School. Planned giving can help you achieve your financial and personal goals. Whether you are motivated by tax savings, financial planning or simply a desire to give back, a gift to Berkeley Hall School ensures that we will continue to honor our school’s founders, Leila and Mabel Cooper, and their directive of “No Limits, No Labels, Lots of Love.”

Planned giving can take many forms, including, but not limited to:

- **Real Estate Transfers And Reserved Life Estates**
- **Bequests**
- **Beneficiary Designations**
(retirement plan, life insurance, annuity, etc.)
- **Qualified Charitable Distribution (QCD)**
- **Private Foundations**
- **Split Interest Trusts**
(charitable lead and charitable remainder)
- **Scholarships**



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For more information on planned giving at Berkeley Hall School or to become a member of The Cooper Society, please inform our Advancement office of your existing planned gift. Please contact:

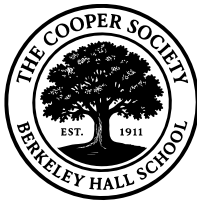
Bria Verdugo-Uy, Director of Development
310-476-6421 ext. 259
bverdugouy@berkeleyhall.org

Those contemplating a planned gift should consult their own legal and financial advisors to ensure coordination with the entirety of their financial and estate plans. The information presented here is intended to be general in nature and is no substitute for professional advice by your tax, estate and financial planning professional. All information here to The Berkeley Hall School is held in strict confidence and recognition as a member of The Cooper Society will not be published without the member's written consent.



**BERKELEY HALL
SCHOOL**

berkeleyhall.org | 16000 Mulholland Drive, Los Angeles, CA 90049



PLANNED GIVING GUIDE

You can name Berkeley Hall School in your long-range plans, including: Your will or trust, using wording such as: “I hereby give to Berkeley Hall School, a not-for-profit organization (Federal Tax ID # 95-1683864) with the location at 16000 Mulholland Drive, Los Angeles, CA 90049, the sum of \$ _____; or _____% of the residue of my estate.”

- IRA or retirement plan
- Real Estate Transfers and Reserved Life Estates
- Bequests
- Life insurance policy
- Financial account
- Charitable IRA distribution: If you are age 70-1/2 or older, you may be eligible to transfer up to \$100,000 in gifts directly from your IRA to Berkeley Hall School and exclude the amount of your gift from taxable income.

SUGGESTIONS FOR BEQUEST VERBIAGE

You may include a bequest to support Berkeley Hall School when preparing your will or living trust, or by adding a codicil to your present will or living trust. Bequests may be of cash, securities, bonds, real estate, copyrights, royalties, or other property. Bequests of all sizes are welcome, whether they are outright, residual, or contingent. The following information is not intended to be legal or tax advice. We recommend that you consult with a qualified estate planning attorney when drafting your will or living trust. These are suggestions only to be of assistance to you or your attorney when filling out the Berkeley Hall School Planned Giving Notification form:

SPECIFIC BEQUEST:

“I hereby give to Berkeley Hall School, a not-for-profit organization (Federal Tax ID # 95-1683864) with the location at 16000 Mulholland Drive, Los Angeles, CA 90049, the sum of \$ _____; or _____% of my estate for general support purposes.”

RESIDUAL BEQUEST:

“I hereby give to Berkeley Hall School, a not-for-profit organization (Federal Tax ID # 95-1683864) with the location at 16000 Mulholland Drive, Los Angeles, CA 90049, _____% of the residue of my estate for general support purposes.”

CONTINGENT BEQUEST:

“In the event that _____ predeceases me, I hereby give to Berkeley Hall School, a not-for-profit organization (Federal Tax ID# 95-1683864) with the location at 16000 Mulholland Drive, Los Angeles, CA 90049, _____% of the residue of my estate for general support purposes.

