



BUCKINGHAM BROWNE & NICHOLS SCHOOL - ALMY SOCIETY
Non-Binding Planned Gift Intention and Designation Form

This form allows individuals to formally document their future Bequest intentions to Buckingham Browne & Nichols School while maintaining the flexibility to modify these intentions, as they are not legally binding commitments.

Today's Date: _____

State of Domicile: _____

Name: _____

Date of Birth: ____/____/____

Home Phone: _____ Mobile Phone: _____

E-mail(s): _____

Spouse/Significant Other Name:

Date of Birth: ____/____/____

Home Phone: _____ Mobile Phone: _____

E-mail: _____

Constituency (check one or more):

- Alumni* Current/Past Parent Current/Past Grandparent Current/Former Faculty/Staff
 Current/Former Board of Trustee Member

*Class Year(s): _____

I/we are pleased to inform you that my/our estate planning document(s) executed in _____ (year), include(s) a provision(s) for Buckingham Browne & Nichols School, 80 Gerry's Landing, Cambridge, MA 02138.

A copy is attached.

(over)

DESIGNATION OF GIFT

Unrestricted Endowment

Designated Area:

My/our gift is made in honor or memory of:

GIFT VEHICLE:

Bequest

Life Insurance

IRA

Qualified Plan

Charitable Remainder Trust
Fund-Succession Plan

Charitable Lead Trust

Donor Advised

GIFT TYPE:

Specific Amount \$ _____ Percent of Estate (____ %)

Gift of Residue Other: _____

Revocable or Non-revocable Comments: _____

GIFT ACKNOWLEDGEMENT: - YOUR NAME WILL BE PRINTED IN OUR PUBLICATIONS AS A MEMBER OF THE ALMY SOCIETY AS: _____ UNLESS OTHERWISE INDICATED BELOW.

I/We prefer the terms of this gift to remain anonymous.

ADDITIONAL INFORMATION:

I/We will notify BB&N if this bequest changes.

To assist BB&N in their planning efforts, the approximate current value of my/ our bequest is:

\$ _____.

Signature: _____ Date: _____

Spouse's Signature *if applicable*

_____ Date: _____

Optional Information:

Attorney/Advisor Name: _____

Work Phone: _____ E-mail: _____