



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. ☐

DESIGNATION OF GIFT

- ☐ Unrestricted Endowment ☐ Designated Area:

(over)

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

GIFT VEHICLE:

- ☐ Bequest ☐ Life Insurance ☐ IRA ☐ Qualified Plan
☐ Charitable Remainder Trust ☐ Charitable Lead Trust ☐ Donor Advised Fund-Succession Plan

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: _____

Instructions:

Please mail the original-signed Non-Binding Planned Gift Intention and Designation Form to Linda Gallinaro so that we can keep it on file. For security reasons, **please do not email the signed form.**

Mailing address:

Buckingham Browne & Nichols-Advancement Office

Attention: Linda Gallinaro, Director of Development

80 Gerry's Landing, Cambridge, MA 02138

For questions: Please contact Linda Gallinaro at lgallinaro@bbns.org or at 617-800-2721