



# WATERFORD COUNTRY SCHOOL

## Legacy Society

### Confidential Statement of Legacy Gift

Legacy donors who have remembered the Agency with a life income gift or have named Waterford Country School as a beneficiary of a will, trust, retirement plan or life insurance policy are recognized members of the Legacy Society. If you would like to make a legacy gift to Waterford Country School, please complete the form and return it to us.

Name: \_\_\_\_\_ Is this a joint gift? (Y/N) \_\_\_\_\_

Spouse: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Spouse Date of Birth: \_\_\_\_\_

### I/We have named Waterford Country School as a beneficiary in one or more (Check all that apply):

- Will or Living Trust \_\_\_\_\_ specify amount or \_\_\_\_\_ %
- IRA, pension, 401(K), 403(b) or other retirement account
- Life Insurance Policy
- Charitable Remainder Trust (CRT)
- Charitable Lead Trust (CLT)
- Donor-advised Fund
- Other (please specify): \_\_\_\_\_

I/We have attached copies of the documentation of the documentation (ex. Sections of my will or trust, beneficiary designation forms, bank or brokerage statements, etc.) \_\_\_\_\_ (Please initial).

Gift Value (or best estimate) \_\_\_\_\_

Comments: \_\_\_\_\_

Designate your wishes as a Member of the Waterford Country School Legacy Society:

- Yes, I/we would like to be included by name as Society members in WCS publications.

Naming as you would like it to appear: \_\_\_\_\_

- No, I/we prefer to remain anonymous and not be named. We will accept other benefits of membership.

**While this form is not a binding agreement or pledge, it simply permits us to record you estimated gift, recognize you for this intention, and have the records in order for future use. The details of this form as well as any additional information you share with us will remain confidential.**

Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_

