



201 SOUTH MAIN STREET
HIGHTSTOWN, NJ 08520

(609) 944-7500
PEDDIE.ORG

CONFIDENTIAL STATEMENT OF BEQUEST PROVISION

All contributions, including bequests, are critical to ensuring fulfillment of Peddie's mission.

SECTION 1: ESTATE COMMITMENT

AS A DEMONSTRATION OF SUPPORT FOR PEDDIE, A BEQUEST PROVISION IS INDICATED BELOW:

- | | |
|---|--|
| <input type="checkbox"/> Will or revocable trust | <input type="checkbox"/> Charitable Gift Annuity |
| <input type="checkbox"/> Other type of trust:
_____ | <input type="checkbox"/> The Peddie Pooled Income Fund |
| (please specify) | <input type="checkbox"/> Other beneficiary designation (e.g., bank account,
bond, donor-advised fund):
_____ |
| <input type="checkbox"/> IRA or retirement plan beneficiary designation | (please specify) |
| <input type="checkbox"/> Life insurance beneficiary designation | |

THE GIFT IS STATED AS:

- ☐ A specific dollar value: \$ _____
- ☐ A percentage of estate/account ____ % / The estimated current value of the estate is \$ _____

PEDDIE WILL RECEIVE THE GIFT:

- ☐ Upon my death ☐ Upon the death of my surviving spouse/partner
- ☐ Other: _____
(please specify)

SECTION 2: GIFT DESIGNATION

THE PLAN DIRECTS PEDDIE TO USE THE GIFT FOR:

- | | |
|---|---|
| <input type="checkbox"/> Peddie's greatest need
(unrestricted) | <input type="checkbox"/> Athletics |
| <input type="checkbox"/> Student scholarship | <input type="checkbox"/> Arts |
| <input type="checkbox"/> Faculty support | <input type="checkbox"/> Other |
| <input type="checkbox"/> Academic programs | <input type="checkbox"/> An endowed fund I/we already established:
_____ |
| | (please specify) |

SECTION 3: ESTATE CONTACT INFORMATION

MY PROFESSIONAL ADVISOR OR THE EXECUTOR OF MY ESTATE IS:

Name: _____

Email: _____ Phone: _____

SECTION 4: DONOR AND GIFT RECOGNITION

DONOR NAME/SIGNATURE

Donor Name/Class Year (please print): _____ Birthdate: _____

Donor Signature: _____ Date: _____

☐ MY SPOUSE/PARTNER HAS ALSO PROVIDED FOR PEDDIE THROUGH ESTATE PLANNING.

Spouse/Partner Name (please print): _____ Birthdate: _____

Spouse/Partner Signature: _____ Date: _____

PLEASE LET US KNOW IF WE MAY RECOGNIZE YOU AS A MEMBER OF THE BELL SOCIETY:

☐ Yes, I/we give permission to list my/our name(s) in publications as a member(s) of the Bell Society.

☐ No, please list me/us as an anonymous donor(s).

Peddie understands that this statement of bequest provision is not a legal or binding commitment, and that the amount listed above is an estimate. You have the right to revise this gift at any time if circumstances change. As a courtesy, Peddie would appreciate notification in that event. For donors age 70 by June 30, 2022, your gift will be credited toward the school's comprehensive campaign. As always, please consult your financial, tax, and/or legal advisors to determine benefits of making a planned gift.

DOCUMENTATION CHECKLIST

Documenting your bequest allows us to better steward your future gift and personally express our gratitude to you now. Under Peddie's Gift Acceptance Policy, certain documentation is required for bequest intentions to be included in fundraising totals. Thank you for thoughtfully supporting Peddie's future for generations to come.

CHECK THAT YOU HAVE INCLUDED:

☐ A copy of the portion of the will or trust document or beneficiary designation form referencing the planned gift to Peddie.

☐ The document's signature page.

☐ A page indicating the date of the document.

☐ If the bequest is included as part of an estate plan that will not be realized until the death of a survivor, copies of the spouse/partner's documents from the above list.

PLEASE RETURN THIS FORM WITH ANY RELATED DOCUMENTATION TO:

The Peddie School | Office of Alumni and Development | 201 South Main Street, Hightstown, NJ 08520-3349
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