

North Cross School

PLANNED GIFT STATEMENT OF INTENT

I/we want to make North Cross School aware that I/we have provided for the school through a planned or deferred gift.

My/our planned gift is in the form of a:

Bequest *Restricted* *Unrestricted* *Endowed* *Honorary*

Bequest Alternative *Life Insurance Policy* *Retirement Plan (IRA, savings bond, etc.)*

Beneficiary Designations: Gift of Retirement Account / Gift of Life Insurance / Other Assets

(Annuity Contracts, Bank Accounts, Investment Accounts, etc.)

Charitable Lead Trust

Charitable Remainder Trust

Other (please describe): _____

Current estimated value: _____

(A good faith current estimate is all that is needed.)

My philanthropic plans for North Cross School are:

Revocable

Irrevocable

Anonymous

Gift designation:

Unrestricted

Restricted (Please indicate purpose: _____)

This expression of intent to support the School through a planned gift is made in honor of the class of _____.

Name(s): _____

Address: _____

Telephone: _____ E-mail: _____

Signature: _____ Date: _____

Please note, completing this form only informs North Cross School of your plans. It does not obligate you in any way.

North Cross School recommends that all persons considering a planned gift consult with their professional advisors. Also, the School encourages alumni and friends to discuss their plans with staff to ensure their wishes are understood and that North Cross School can comply with your wishes.