ST. PAUL'S
INDEPENDENT DAY SCHOOL

Jillian Davis Pinkard
Campaign Director
jpinkard@stpaulsschool.org
Office: 410.821.3050
Fax: 410.427.0390

Advisor's Guide for Planned Giving

GIFTS FROM WILLS AND TRUSTS:
When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name St. Paul's School in your will or trust please use the following suggested language:

RESIDUAL GIFT LANGUAGE:
A residual bequest comes to us after your estate expenses and specific bequests are paid:

> I give and devise to The Boys School of St. Paul's Parish (Tax ID #52-0591463), located in Brooklandville, MD, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

SPECIFIC GIFT LANGUAGE:
Naming St. Paul's School as a beneficiary of a specific amount from your estate is easy:

> I give and devise to The Boys School of St. Paul's Parish (Tax ID #52-0591463), located in Brooklandville, MD, the sum of $___________ (or asset) to be used for its general support (or for the support of a specific fund or program).

CONTINGENT GIFT LANGUAGE:
St. Paul's School or its affiliates can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

> If (insert name) is not living at the time of my demise, I give and devise to The Boys School of St. Paul's Parish (Tax ID #52-0591463), located in Brooklandville, MD, the sum of $ _______ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).

GIFTS OF APPRECIATED SECURITIES:
Legal Name: The Boys School of St. Paul's Parish
Tax I.D. Number: 52-0591463
DTC Number: 0141
Incorporated in: Brooklandville, MD
Please contact us for a stock transfer form.

BENEFICIARY GIFTS FROM RETIREMENT PLANS, LIFE INSURANCE, BROKERAGE ACCOUNTS OR ANY OTHER PLAN WITH A BENEFICIARY DESIGNATION:
Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to Jillian Davis Pinkard, Director of Leadership Giving .