

UNIVERSITY SCHOOL
Estate Plan Intention and Designation*

** Information provided is non-binding and confidential.*

Today's Date: _____ State of Domicile: _____

Name: _____ Class Year: _____ Date of Birth: ____/____/____

Spouse's Name: _____ Date of Birth: ____/____/____

Home Phone: _____ Work Phone: _____ E-mail: _____

I/we are pleased to inform you that my/our estate planning document(s) executed in _____ (year), include(s) a provision for University School. A copy is attached.

DESIGNATION OF GIFT

Unrestricted Endowment Designated Area: _____

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

GIFT VEHICLE Bequest CRT CLT Life Insurance
 Qualified Plan CGA RLE

GIFT TYPE Specific Amount Percent of Estate (____ %) Gift of Residue Other: _____

Revocable or Non-revocable Comments: _____

GIFT ACKNOWLEDGEMENT -YOUR NAME WILL BE PRINTED IN US PUBLICATIONS AS A MEMBER OF THE HEADMASTER'S CLUB AS SPECIFIED BELOW:

I/We prefer to be anonymous.

I/We would like our name(s) listed in US publications as members of the Headmaster's Club as:

Please print

ADDITIONAL INFORMATION

I/We will notify University School if this bequest changes.

To assist University School 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: _____

THE HEADMASTER'S CLUB
Preserve the Past. Provide for the Future.