



Honoring benefactors whose estate plans  
advance the aims of The Peddie School.

201 SOUTH MAIN STREET  
HIGHTSTOWN, NJ 08520

(609) 944-7500  
PEDDIE.ORG

## CONFIDENTIAL STATEMENT OF PLANNED GIFT INTENTION

Planned gifts are essential to helping Peddie move forward.

### SECTION 1: PLANNED GIFT COMMITMENT

AS A DEMONSTRATION OF SUPPORT FOR PEDDIE, I AM COMPLETING THIS FORM TO LET PEDDIE KNOW THAT I AM PLANNING TO PROVIDE FOR PEDDIE THROUGH A:

- ☐ Will or living trust
- ☐ Other type of trust:

\_\_\_\_\_

*please specify*

- ☐ Charitable gift annuity
- ☐ The Peddie Pooled Income Fund

- ☐ Beneficiary designation:
  - ☐ IRA or retirement plan
  - ☐ Life insurance
  - ☐ Other beneficiary designation (e.g., bank account, bond, donor-advised fund):

\_\_\_\_\_

*please specify*

MY ESTIMATED GIFT IS: \$ \_\_\_\_\_

For gifts that are a percentage of an estate/account/trust, please provide your best estimate for the amount of your gift based on the date you are signing this form.

PEDDIE WILL RECEIVE THE GIFT:

- ☐ Upon my death    ☐ Upon the death of my spouse/partner

☐ Other: \_\_\_\_\_

*please specify*

### SECTION 2: GIFT DESIGNATION

THE PLAN DIRECTS PEDDIE TO USE THE GIFT FOR:

- ☐ Peddie's greatest need (unrestricted)
- ☐ Student access
- ☐ Faculty support
- ☐ Academic programs
- ☐ Athletics
- ☐ Arts
- ☐ Student life
- ☐ Diversity, equity and inclusion programs
- ☐ An endowed fund 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 A PLANNED GIFT.

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 anonymous donor(s).

## SECTION 5: DOCUMENTATION CHECKLIST

Documenting your planned gift 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 planned gift intentions to be included in fundraising totals. Thank you for building a legacy at Peddie that will last beyond your lifetime.

### 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

Phone: (609) 944-7521 | Fax: (609) 944-7902 | [bellsociety@peddie.org](mailto:bellsociety@peddie.org) | [peddie.giftplans.org](http://peddie.giftplans.org)

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. As always, please consult your financial, tax, and/or legal advisors to determine benefits of making a planned gift.