

Lenox School Alumni Association

Bequest Intention Form

CONFIDENTIAL

Please use this form to share the details of your bequest intentions with the Lenox School Alumni Association. In recognition of your disclosure, we will be honored to invite you to join our Centennial Legacy Club, a select group of donors who have created a future gift intention to the Lenox School Alumni Association Fund, a fund of Berkshire Taconic Community Foundation.

My/our estate plan designates Berkshire Taconic Community Foundation as follows:

1. _____ There is a bequest in my/our will or trust to benefit the Foundation

- A specific dollar amount: \$ _____
- A percentage of my/our estate: _____ %
- The residual of my/our estate

Enclosed is a copy of the relevant provision in my/our will

**2. _____ BTCF is a/the beneficiary of my IRA or other retirement plan
and/or**

_____ BTCF is the beneficiary of:

- A Charitable Remainder Trust
- A Life Insurance Policy
- A Financial or Investment Account

Currently, I estimate that this may result in a gift of: \$ _____

I have a grants directive on file Attached is my grants directive

_____ I/We hereby give permission to the Foundation to use my/our name/Fund in its publications.

_____ I/We hereby choose to have my/our name(s) remain anonymous.

_____ I/We hereby give permission to the Foundation to use my/our name/Fund in its publications after my/our lifetime.

Signed: _____ Date of Birth: _____ Dated: _____

Signed: _____ Date of Birth: _____ Dated: _____

(see other side)

Contact Info

Donor(s)

Name (s): _____

Address: _____

City: _____ State: _____ Zip: _____

Home Ph: _____ Cell: _____ Email: _____

Attorney

Name/Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Work: _____ Cell: _____ Email: _____

Financial Advisor

Name/Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Work: _____ Cell: _____ Email: _____

Sample Bequest Language

The following provides typical language to include a charitable bequest in your will. Please consult with your attorney.

1. Percentage: "I give to Lenox School Alumni Association Fund, a fund of Berkshire Taconic Community Foundation), a nonprofit corporation of the state of Connecticut, located at 800 North Main Street, Sheffield, MA, 01257, _____% of my estate."

2. Specific: "I give to Lenox School Alumni Association Fund a fund of Berkshire Taconic Community Foundation), a nonprofit corporation of the state of Connecticut, located at 800 North Main Street, Sheffield, MA, 01257" (Choose one or more that apply):

- a. The sum of \$ _____
- b. _____ shares of stock in _____ Company
- c. My real property commonly known as _____.

3. Residual: "I give to Lenox School Alumni Association Fund, a fund of Berkshire Taconic Community Foundation), a nonprofit corporation of the state of Connecticut, located at 800 North Main Street, Sheffield, MA, 01257, all the residue of my estate, including real personal property."

3. **Contingent:** "In the event of the death of any of the beneficiaries, I give to Lenox School Alumni Association Fund, a fund of Berkshire Taconic Community Foundation), a nonprofit corporation of the state of Connecticut, located at 800 North Main Street, Sheffield, MA, 01257, _____ (a percentage, specific, or residual language as above).

If you have any questions, please contact Kelly Sweet. 413-717-7036 ksweet@berkshiretaconic.org