



Bequest Language

Planned Giving at Concord Academy

ENSURE CA'S FUTURE

The lasting impact of bequests—both large and small—shapes Concord Academy today and tomorrow. For many alums, a charitable bequest is the easiest and best way to make a gift to the school. By means of your will, retirement account, life insurance policy, or other estate plan, you can name Concord Academy as the beneficiary of a portion of your estate or of particular assets in your estate.

Many of the most powerful gifts with an enduring impact have been bequests. Giving a bequest costs nothing now, yet it may give you a great deal of satisfaction to know that your future gift will live on.

HOW A BEQUEST WORKS

Including Concord Academy in your will, trust, life insurance policy, or retirement plan is an effective way to support Concord Academy in the future while preserving your assets during your lifetime. By simply indicating a specific dollar amount or percentage of the balance remaining in your estate or trust, you can direct your bequest to a specific area of interest or make an unrestricted gift to Concord Academy.

EXAMPLES OF BEQUEST LANGUAGE

I give and devise to Concord Academy (Tax ID #04-1200600), located in Concord, Massachusetts, 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 (for the support of a specific fund or program).

I give and devise to Concord Academy (Tax ID #04-1200600), located in Concord, Massachusetts, the sum of \$ _____ (or asset) to be used for its (specific fund or program). If, in the future, it is the opinion of the Head of School and Trustees that all or part of

the income of this fund cannot be usefully applied to such a purpose, the Head of School and Trustees may use the same for any purpose that will most nearly accomplish my wishes.

EXAMPLES OF BENEFICIARY DESIGNATIONS

You may name Concord Academy (Tax ID #04-1200600) as a beneficiary of your IRA or other qualified retirement benefits. Donors should consult with their tax advisor regarding the tax benefits of such gifts. Making a charitable gift from your retirement plan is easy and should not cost you any attorney fees. Simply request a change-of-beneficiary form from your plan administrator. When you have finished, please return the form to your plan administrator and notify Concord Academy. We can also assist you with the proper language for your beneficiary designation to the school.

We can help you or your representatives plan a gift that will best serve your own financial future and best benefit Concord Academy. We can provide sample language, tax calculations, and informational literature and are happy to meet with you by phone or in person.

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