



JOHN F. GODMAN SOCIETY PLANNED GIFT INTENTION FORM

Please complete this form to ensure that your legacy wishes are fulfilled and that we may recognize you as a member of Berkshire School's John F. Godman Society.

Name

Name of Spouse/Partner

Address

Address

City State Zip

City State Zip

Home Phone Cell Phone

Home Phone Cell Phone

Email

Email

Date of Birth (month/day/year)

Date of Birth (month/day/year)

Berkshire Alumni Class Year or Affiliation

Berkshire Alumni Class Year or Affiliation

I/we have remembered Berkshire School through my/our (check all that apply):

- | | |
|--|--|
| <input type="checkbox"/> Will | <input type="checkbox"/> Mutual Fund |
| <input type="checkbox"/> Retirement Plan, e.g. IRA, 401(k), 403(b) | <input type="checkbox"/> Living Trust |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Surviving Spouse/Partner's Will, Trust, or Other
(please state): _____ |
| <input type="checkbox"/> Charitable Gift Annuity | <input type="checkbox"/> Other (real estate, personal property, etc.):
_____ |
| <input type="checkbox"/> Donor Advised Fund | |
| <input type="checkbox"/> Charitable Lead Trust | |
| <input type="checkbox"/> Charitable Remainder Trust | |

Berkshire School is a: Primary Beneficiary Contingent Beneficiary

My/our gift is a (it is helpful for the school to know more about your gift, although this information is optional):

- Fixed dollar amount: \$ _____ Specified percentage: _____% Residual amount

My/our estimate of the gift amount as of today is: \$ _____

My/our gift is:

- Irrevocable (cannot be changed) Revocable
- Revocable, but I would like to know more about making it irrevocable. Please contact me.

I/we would like this gift to benefit Berkshire School through the following designation

(e.g. Annual Fund or endowment, unrestricted, restricted as noted, etc.):

May we include your name in published lists of the John F. Godman Society?

(The amount and type of your gift will not be published.)

- Yes No, I prefer to remain anonymous

I/we understand the school's interest in estimating long-term planning and will submit one of the following to substantiate my planned gift (this is optional and helps Berkshire School to document and count your intention):

- Relevant page(s) from my/our will or trust
- Beneficiary Designation Form
- Letter from my/our attorney or financial planner
- Other helpful information (e.g. name, address, and telephone of trustee or executor/IRA Company):

By signing here, I/we are informing Berkshire School that the above provisions are in effect as of this date.

Donor(s) Signature(s)

Date



Thank you for becoming a member of the John F. Godman Society.

Your membership helps Berkshire School plan for the future and serves as an inspiration for others to do the same.

If you have any questions or would like to know more about other planned giving vehicles, please contact:
Jeff Leyden, Director of Planned Giving
207-624-2044, jleyden@berkshireschool.org

Please return completed form to:
Berkshire School Office of Advancement
245 N. Undermountain Rd., Sheffield, MA 01257
Berkshire School Tax ID (EIN): 04-2121313

Please provide any additional information here:
