

Confidential Bequest Intention



Phillips Exeter Academy

Please complete this form to help ensure your wishes are fulfilled, and so that we may recognize and honor you as a member of Exeter's *Heritage Circle*.

Name _____ Spouse Name _____

Address _____ City _____ ST _____ Zip _____

Class _____ Date(s) of Birth _____ Email _____

Home Phone _____ Bus/Cell Phone _____

Bequest Intention

Please provide us the following information about your intention to include Exeter in your will or as beneficiary of your IRA/retirement plan, and if possible provide a copy of the documentation or applicable language from your will or trust.

- I/we have included a bequest to Exeter in my/our will, IRA or Trust.
 - in the amount of \$ _____
 - as a percentage of my/our estate. ____%: Estimated value of gift \$ _____
 - at this time I/we prefer not to specify the amount of my/our bequest.

I would like to designate my gift to:

- The Academy's general purposes, or
- Scholarship Aid, or
- An existing named fund _____

Please indicate how you would like your name(s) to appear in our *Heritage Circle* listings. No details of your bequest will be made public.

- I/we wish to remain anonymous at this time.

Return to:
Phillips Exeter Academy
Office of Planned Giving
20 Main Street
Exeter, NH 03833

Questions? Please contact:
Phil Perham, director of planned giving
603-777-3594
pperham@exeter.edu

This form does not bind you or your estate to any future gift to Phillips Exeter Academy. Phillips Exeter Academy (PEA) is not permitted to provide its donors with legal or tax advice regarding gifts to PEA. PEA strongly recommends that donors consult their attorneys or other tax advisors regarding the consequences of, and reporting obligations associated with, their gifts. As a courtesy, PEA or PEA's attorneys may provide donors with draft trust, pledge or other documents in connection with the donors' proposed gifts. It is imperative that donors review these documents with their own attorneys before signing to ensure that the documents are consistent with the donors' objectives.