



ST. PAUL'S SCHOOL

Bequest Language

Specific Gift Language

Naming St. Paul's School as a beneficiary of your estate is simple. The following language is all that is necessary to make a gift of a specified amount to SPS.

I bequeath and devise to St. Paul's School (Tax ID# 02-0222227), located in Concord, NH, the sum of \$_____ (or other asset with a fair-market value of \$X) to be used for the School's general support (*or* for the support of a specific fund or program).

I bequeath and devise to St. Paul's School (Tax ID# 02-0222227), located in Concord, NH, the sum of X% of my gross estate (or X% of particular asset) of my estate to be used for the School's general support (*or* for the support of a specific fund or program).

Retirement-Plan Beneficiary Language

You may also name St. Paul's School (Tax ID# 02-0222227) as a beneficiary of your IRA or other qualified retirement plan.

Naming St. Paul's School as a beneficiary of a qualified retirement-plan asset is simple and will likely have significant tax advantages. By naming St. Paul's School as a beneficiary of a retirement plan, the donor maintains complete control over the asset while living; but at the donor's death, the assets are gifted to St. Paul's School free of both estate and income taxes.

Making a charitable gift from your retirement plan is easy. Simply request a change-of-beneficiary form from your plan administrator and designate St. Paul's School as a percentage beneficiary of the plan. From there, just return the completed form to your plan administrator and notify St. Paul's School. Donors should always consult with their professional services team as to the particular tax outcomes of such gifts.

Contingent Gift Language

You may also name St. Paul's School as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I bequeath and devise to St. Paul's School (Tax ID# 02-0222227), located in Concord, NH, the sum of \$ _____ (or all or a percentage of my gross estate) to be used for School's general support (or for the support of a specific fund or program).

Customized Language

If you or your professional services team would like St. Paul's School to provide you with customized beneficiary language that is specific to your goals and interests, please contact us.

Changing a Will

Do you need to make a change to your will without having to draft an entirely new document? A codicil may be a great solution. A codicil is an addendum to a will that explains, modifies, or revokes a will or a part of one.