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# ADVISOR'S GUIDE FOR PLANNED GIVING

## **Gifts from Wills and Trusts:**

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name Boston Latin School Association in your will or trust please use the following suggested language:

**Residual Bequest** — A residual bequest comes to us after your estate expenses and specific bequests are paid.

*I give and devise to Boston Latin School Association (Tax ID #04-6035973), located in Boston, MA, 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 (or for the support of a specific fund or program).*

**Specific Bequest** — Naming Boston Latin School Association as a beneficiary of a specific amount from your estate is easy.

*I give and devise to Boston Latin School Association (Tax ID #04-6035973), located in Boston, MA, the sum of \$ \_\_\_\_\_ (or asset) to be used for its general support (or for the support of a specific fund or program).*

**Contingent Bequest** — Boston Latin School Association can be named 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 give and devise to Boston Latin School Association (Tax ID #04-6035973), located in Boston, MA, the sum of \$ \_\_\_\_\_ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).*

## **Gifts of Appreciated Securities:**

Please contact Nicole Dumas for a stock transfer form.

## **Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:**

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to Nicole Dumas.

Legal Name: Boston Latin School Association

Tax I.D. Number: 04-6035973

Incorporated In: Boston, MA

## **Note to Attorneys, Accountants and other professional Advisors:**

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please call Peter G. Kelly '83 at (617) 424-1635 ext. 188.