CONFIDENTIAL STATEMENT OF BEQUEST PROVISION

All contributions, including bequests, are critical to ensuring fulfillment of Peddie’s mission.

SECTION 1: ESTATE COMMITMENT

AS A DEMONSTRATION OF SUPPORT FOR PEDDIE, A BEQUEST PROVISION IS INDICATED BELOW:

☐ Will or revocable trust
☐ Other type of trust:
   ____________________________
   (please specify)
☐ IRA or retirement plan beneficiary designation
☐ Life insurance beneficiary designation

THE GIFT IS STATED AS:
☐ A specific dollar value: $ ____________________
☐ A percentage of estate/account ___ % / The estimated current value of the estate is $ ____________

PEDDIE WILL RECEIVE THE GIFT:
☐ Upon my death  ☐ Upon the death of my surviving spouse/partner
☐ Other: ____________________________
   (please specify)

SECTION 2: GIFT DESIGNATION

THE PLAN DIRECTS PEDDIE TO USE THE GIFT FOR:

☐ Peddie’s greatest need
   (unrestricted)
☐ Student scholarship
☐ Faculty support
☐ Academic programs
☐ Athletics
☐ Arts
☐ Other
☐ An endowed fund I/we already established:
   ____________________________
   (please specify)
Documenting your bequest allows us to better steward your future gift and personally express our gratitude to you now. Under Peddie’s Gift Acceptance Policy, certain documentation is required for bequest intentions to be included in fundraising totals. Thank you for thoughtfully supporting Peddie’s future for generations to come.

CHECK THAT YOU HAVE INCLUDED:

☐ A copy of the portion of the will or trust document or beneficiary designation form referencing the planned gift to Peddie.

☐ The document’s signature page.

☐ A page indicating the date of the document.

☐ If the bequest is included as part of an estate plan that will not be realized until the death of a survivor, copies of the spouse/partner’s documents from the above list.

PLEASE RETURN THIS FORM WITH ANY RELATED DOCUMENTATION TO:
The Peddie School | Office of Alumni and Development | 201 South Main Street, Hightstown, NJ 08520-3349
Phone: 609-944-7521 | Fax: 609-944-7902 | bellsociety@peddie.org | peddie.plannedgiving.org

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