



AMY DE GUIA

Development Coordinator | Office of Development | 253-761-3520

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 Bellarmine Preparatory School in your will or trust please use the following suggested language:

Residual Bequest Language:

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to Bellarmine Preparatory School, located in Tacoma, WA, _____% of the rest, residue and remainder of my estate, both real and personal, to be used for its general unrestricted endowment.

Specific Bequest Language:

Naming Bellarmine Preparatory School as a beneficiary of a specific amount from your estate is easy:

I give and devise to Bellarmine Preparatory School, located in Tacoma, WA, the sum of \$_____ to be used for its general unrestricted endowment.

Contingent Bequest Language:

Bellarmino Preparatory School or its affiliates 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 [name(s)] is not living at the time of my demise, I give and devise to Bellarmine Preparatory School, located in Tacoma, WA, the sum of \$_____ [or _____% of the rest, residue, and remainder of my estate] to be used for its general unrestricted endowment.

Gifts of Appreciated Securities:

Legal Name: Bellarmine Preparatory School

Tax I.D. Number: 91-1109930

DTC Number:

Account #:

Incorporated in: Tacoma, WA

Please contact us 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 Amy de Guia, Development Coordinator | Office of Development .

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 contact Amy de Guia, Development Coordinator | Office of Development, at 253-761-3520.