



MOUNDS PARK ACADEMY
LEGACY SOCIETY

LETTER OF INTENT FOR ESTATE GIFT

I/we desire to provide for the future well-being of Mounds Park Academy through a provision in my/our estate plan. It is my/our understanding that this information is provided to help Mounds Park Academy in projecting future support. I/we understand that this commitment is revocable and can be modified by me/us at any time. Details if your estate plan will be kept strictly confidential.

Name _____ Date of Birth _____
Spouse Name _____ Date of Birth _____
Address _____ Phone _____
_____ Email _____

Mounds Park Academy has been included in my/our estate planning by:

Naming Mounds Park Academy in my/our will or revocable (living) trust for _____ % or \$ _____
 As a primary or contingent beneficiary of:
Retirement Account at _____ for _____ %
Insurance Policy at _____ for _____ %
CD/Security/Bank Account at _____ for _____ %

I/we plan to include Mounds Park Academy as a beneficiary in a manner not described above.
Please specify: _____
*If your gift is a percentage of your estate, please indicate today's approximate value \$ _____

My/our gift is:

Undesignated or unrestricted
 A designated endowment valued at \$50,000 or more for the purpose of _____
 Other

Recognition

Will you allow us to list your names as a member of the Legacy Society?
 Please list my/our names as _____
 No, I/We prefer to remain anonymous

Signature _____ Date _____
Spouse Signature _____ Date _____

