



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 of 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 \_\_\_\_\_

