

As evidence of my/our desire to provide a legacy of support to Bertschi School, I/we hereby inform Bertschi School that I/we have made a provision for a gift to the School in my/our estate plans.

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Name(s) as you would like on official roster/certificate

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Address

City

State

Zip

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Phone

Fax

Email

**It is my/our intent to leave a legacy to Bertschi School through my/our:**

- |                                       |   |  |
|---------------------------------------|---|--|
| <input type="checkbox"/> Will         | <input type="checkbox"/> Retirement Plan Assets     | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Living Trust | <input type="checkbox"/> Charitable Remainder Trust | <input type="checkbox"/> Other                 |

I/we wish to inform Bertschi School, for long-term planning purposes, that as of this date, the intended value of my/our gift is: \$ \_\_\_\_\_

It is my/our desire that this gift be used to benefit the campaign to expand and endow Bertschi School. In consideration of this expressed intent, I would like to be considered for a naming opportunity.

**Please enroll me/us in the Bertschi Legacy Circle under the following conditions:**

- Feel free to publish my/our name(s) among your lists of Bertschi Legacy Circle members as a motivation for others to leave a future gift to benefit Bertschi School. (The amount of your gift is not published.)
- Please list my/our names internally to the School only (no outside publication).
- Do not list my/our names either internally or externally (anonymous gift).

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Date

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Donor(s) Signature(s)

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Date

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Donor(s) Signature(s)