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www.scattergood.org
EIN: 42-0698192

From the Development Office
REVOCABLE GIFT INTENTION FORM

About This Form

As Quakers we would like to respect people's privacy regarding matters of money. We ask these questions to ensure the intentions of your gift are followed through. We are humbled by your willingness to include Scattergood Friends School (EIN: 42-0698192) in your estate plans. Thank you for documenting the wishes of your legacy. This form is NOT legally binding; you can update it at any time.

About You

Name(s): _____

Address: _____ ZIP: _____

Phone: _____ Email: _____

Relationship to Scattergood: _____

About Your Gift

Please check all that apply for the types of gifts you have planned to make. If comfortable, you may estimate the value of each gift in today's dollars. Please include the source of the gift (e.g. IRA held by Vanguard or Life Insurance through MassMutual) if possible.

Will: \$ _____ Insurance Policy: \$ _____

Revocable Living Trust: \$ _____ Real Estate: \$ _____

Charitable Remainder Trust: \$ _____ Retirement Plan: \$ _____

Stocks/Securities: \$ _____ IRA: \$ _____

Other asset(s): \$ _____

Do you have a designated executor of your estate? Yes No

Executor contact information: Name: _____

Phone: _____ Email: _____

About Your Motivations

By including Scattergood as part of your legacy, you are making a commitment to future generations of students and staff. What about Scattergood compels you to show your support in this way? Is there a specific aspect of the school that significantly impacted the life of you or a loved one? Please provide a brief explanation of your motives for making this gift.

Motivations for Gift: _____

About The Hickory Grove

An additional way your planned gift can help Scattergood is by inspiring others to do the same. Knowing that peers support Scattergood via their estate is one of the best ways to encourage someone to make a planned gift. By agreeing to be listed **–by names only** – as a member of The Hickory Grove, the impact of your gift could be amplified.

I/We would like to be listed in The Hickory Grove.

Please list my/our name(s) as: _____

I/We would like to remain anonymous.

*Donor's Signature: _____

Date: _____

Print Name: _____

Birthday: _____

*Donor's Signature: _____

Date: _____

Print Name: _____

Birthday: _____

*This form is not legally binding. If you encounter any questions while filling out this form, please contact Scattergood's Development Office at 319-519-1854 or development@scattergood.org. If willing, you may also attach a signed copy of the relevant pages of your estate.