WELCOME

Elm Tree Society

Providing the information below about your bequest or estate gift to Williston Northampton School enables the School to plan and administer your gifts in accordance with your wishes. Please contact us at (413) 529-3074 with questions.

INFORMATION ABOUT YOUR PLANNED GIFT:

WILLISTON NORTHAMPTON SCHOOL IS NAMED IN MY/OUR ESTATE PLAN AS FOLLOWS:

☐ *Will/Living Trust for ☐ (specified amount) or ☐ (a percentage)

☐ Retirement Plan for ☐ (specified amount) or ☐ (a percentage)

☐ *Charitable Remainder Trust

☐ Donor Advised Fund

☐ Life Insurance Policy

☐ Other

**It is useful for the Office of Advancement to receive a copy of the relevant section(s) of your will or trust.*

I/WE INTEND TO LEAVE THE FOLLOWING TO WILLISTON NORTHAMPTON SCHOOL:

☐ Specific amount: $_____

☐ A percentage of the asset(s) checked above. Estimated value: $_____

☐ Property. Description and estimated value: _____

THIS GIFT IS:

☐ Unrestricted ☐ It is my/our desire to discuss restricted gift options

☐ I am interested in discussing gift designation options; please contact me/us

INFORMATION ON HOW MY/OUR GIFT SHOULD BE AKNOWLEDGED:

☐ Please list my/our name in Elm Tree Society publications (gift details are not listed).

I/we wish to be listed as: _____

☐ Please include my spouse as a member of the Elm Tree Society: _____

☐ Please consider me/us to be anonymous members; do not list us in Elm Tree Society publications.

By: _____ _____
SIGNATURE *DATE*

By: _____
SPOUSE SIGNATURE, IF APPLICABLE

Name: _____
PLEASE PRINT

Address: _____

Phone: _____ Email: _____

Williston Northampton School is a charitable organization under section 501(c) 3 of the Internal Revenue Code and is exempt from federal income taxation. The tax identification number of Williston Northampton School is 04-1975990.