

# MARYVALE

## DEFERRED GIFT LETTER OF INTENT

In order to properly acknowledge and record your gift, please provide the following information about your estate plan.

\_\_\_\_\_  
Name (*please print*)                      Date of Birth                      Spouse/Partner Name                      Date of Birth

\_\_\_\_\_  
Mailing Address    Telephone (primary)                      Telephone (secondary)

\_\_\_\_\_  
City, State Zip    Email Address

### Type of Gift

It is my/our intent to provide a legacy of support to Maryvale Preparatory School through my/our

Bequest                       Charitable remainder trust                       Retirement Plan Assets  
 Charitable lead trust                       Life insurance policy                       Other \_\_\_\_\_

I/We wish to inform Maryvale Preparatory School for long-term planning purposes only that, as of this date, the value of my/our gift is \$ \_\_\_\_\_. (*If your gift is a percentage of your estate, please indicate the approximate present value of that percentage.*) I/We understand that, by stating an amount, my/our estate is not legally bound by this statement, and I/we may choose to add, subtract or revoke this provision at any time, at my/our sole discretion.

### Purpose of Gift

Endowment  
 Faculty Compensation                       General Endowment  
 Financial Assistance                       Other

Gift to be used for the following purpose or program: \_\_\_\_\_

My/Our gift is

In honor of  
 In memory of  
 Anonymous

How would you like your name(s) to appear in the Trinity Society listing: \_\_\_\_\_

A copy of the provision is  attached or  will be mailed when it is executed.

\_\_\_\_\_  
Signature of Donor                      Date                      Signature of Donor                      Date