

WANT TO BE REMEMBERED?

Where there's a will, there's a way.



PEDDIE

LEAVE YOUR MARK ON THE FUTURE WITH A SIMPLE GIFT IN YOUR WILL.

You can make a gift now that will support the mission of Peddie School far into the future. A simple gift through your will or trust makes it possible.

- It costs you nothing during your lifetime.
- It will not reduce your savings or your cash flow.
- It's flexible so you can make changes as required.
- You retain control of your assets during your lifetime and direct how they will be used in the future.
- It's much easier than most people realize. A simple paragraph added to your existing documents is all it takes.

MAKING A TRIBUTE GIFT IN YOUR WILL TO HONOR SOMEONE YOU CARE ABOUT IS MUCH SIMPLER THAN MOST PEOPLE REALIZE.

A GIFT THROUGH YOUR WILL COULD BE RIGHT FOR YOU IF...

- You want the flexibility of a gift that doesn't affect your current cash flow.
- You like the idea of a very simple gift plan.
- You want the freedom to change your mind and amend your gift down the road.
- Long-term planning is more important to you than an immediate income tax deduction.
- You believe in the mission of Peddie School and want to see it continue for generations to come.
- You wish to create a charitable legacy and make an enduring statement about your priorities.
- You want to honor a loved one with a tribute gift.

HOW IT WORKS

- Making a gift through your will or trust is very simple. It can be as easy as including language stating, *"I give ten percent of the net value of my estate to Peddie School."*
- Make your gift unrestricted to be used where it's needed most or direct it to a specific purpose or

aspect of our mission that is meaningful to you. You can also set up a named fund or honor a loved one.

- Your gift can be a specific dollar amount, personal property or percentage of your estate. Or you can leave Peddie School the balance remaining after your obligations are met and your heirs are cared for.
- If you already have a will or estate plan in place, you can update it to include a gift to Peddie School with a simple amendment called a codicil. See the next page for suggested language you can take to your advisor or attorney.



BENEFITS

- Your assets remain in your control during your lifetime.
- You can modify your gift down the road to address changing circumstances.
- Your estate will receive a tax deduction for the full fair market value of the charitable bequest.
- Your heirs will know that the mission of Peddie School matters to you.

INTERESTED?

Would you like to learn more about how to leave a lasting legacy with a simple gift through your will or trust? Do you want to explore the opportunities and find the best way to honor a loved one with a special tribute gift? Please contact us. We can help you dream up your perfect legacy gift, and then we can collaborate with your advisors to make your dream a reality.

YOUR LEGACY BEGINS TODAY.

A gift through your will or trust is easier to arrange than most people realize. Here is some legal language you can share with your attorney to help make the process even simpler.

To give a portion of what remains in your estate after all your expenses are met and other bequests fulfilled:

I give and devise to Peddie School located in <<city>>, <<state>>, all (or state a percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

To make a contingent bequest:

If (insert name) is not living at the time of my demise, I give and devise to Peddie School, located in <<city>>, <<state>>, the sum of \$ _____ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a

To give a specific dollar amount or a percentage of your estate:

I give and devise to Peddie School, located in <<city>>, <<state>>, (the sum of \$ _____) OR (_____ %) of my estate to be used for its general support (or for the support of a specific affiliate, fund or program).

To give a portion of what remains in your estate after all your expenses are met and other bequests fulfilled:

I give and devise to Peddie School located in <<city>>, <<state>>, all (or state a percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

When you already have a will and want to add a charitable gift without changing anything else:

I, (your full name), a resident of (your city and state), having made my Last Will and Testament dated _____, do hereby make this Codicil to said Will.

I hereby amend Article _____ of my will by giving Peddie School, located in <<city>>, <<state>> (the residue of my estate) OR (_____ % of my estate) OR (the sum of _____ dollars) and accordingly:

(Repeat and revise article in your will which you are changing.)

YOU'VE WORKED HARD TO ACHIEVE WHAT YOU HAVE. A WILL GIVES YOU THE CONTROL YOU DESERVE TO SAY WHAT HAPPENS TO IT.



Peddie School provides support for a full range of charitable gift planning options and services. Peddie School, its employees or representatives, do not offer legal or financial advice.

CONTACT US. WE'RE HERE TO HELP.

PEDDIE

Anne D. DeMesa
Director of Gift Planning
Peddie School
201 South Main Street
Hightstown, NJ 08520

Phone: 609-944-7615
Fax: 609-944-7902
Email: ademesa@peddie.org