



# The Swenson Society

Planned gifts have a significant impact on the future of Ransom Everglades School. Your careful planning will allow us to address our future needs and direction in a confident and prudent manner, ensuring the school's place as one of the nation's finest independent schools. This document will provide a basis for recognition in The Swenson Society here at Ransom Everglades School. The Swenson Society honors alumni, parents and friends who have remembered Ransom Everglades School in their estate plans through charitable bequests, trusts, beneficiary designations and life income gifts.

## CONFIDENTIAL

- I/We have remembered Ransom Everglades School in my/our estate plans and wish to join the Swenson Society.
  - Please list my/our name(s) below in The Swenson Society honor roll listings.
  - I/We prefer to remain an anonymous member of The Swenson Society.

### I/We have remembered Ransom Everglades School in my/our estate plans as follows:

- I/We have named Ransom Everglades School as a beneficiary of a  will or  living trust:
  - Specific bequest [in the amount of \$\_\_\_\_\_]
  - Residual bequest as a percentage \_\_\_\_\_ % [ the current market value of which the percentage represents is approximately \$\_\_\_\_\_]
- I/We have named Ransom Everglades School as the death or remainder beneficiary in one or more of the following:
  - IRA, pension or other retirement account [e.g., 401(k) or 403(b) plans]
  - Charitable remainder trust
  - Life insurance policy
  - Other (please specify): \_\_\_\_\_

[Approximate amount of your gift: \$\_\_\_\_\_]
- Gift designation:
  - For general purposes (unrestricted)
  - Financial aid
  - Faculty support
  - If otherwise restricted, please specify the appropriate fund \_\_\_\_\_
- I/We agree to notify Ransom Everglades School if the foregoing is modified, changed or altered in any way.

Names as listed:      Self \_\_\_\_\_  
   Spouse \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### **Return to:**

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1. For bequest intentions and designations in a living trust, in which either a dollar amount or a percentage of the estate is specified, if a percentage is specified, the commitment should be accompanied by a credible estimate of the value of the estate at the time of the commitment. In addition, the estate commitment should be verified with a copy of the testamentary document or a letter from the donor's estate advisor. The documentation should also specify any restrictions on the use of the funds.
2. For IRA/Retirement Plan Beneficiary Designations in which either a dollar amount or a percentage of the account is specified, the commitment should be accompanied by a copy of the designation as well as a credible estimate of the value of the account at the time of the commitment.
3. For charitable remainder trusts in which the donor retains the right to change the beneficiary, a copy of the trust document showing RE's remainder interest should accompany the commitment.