



## LEGACY SOCIETY ESTATE INTENTION FORM

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Name \_\_\_\_\_  
Address \_\_\_\_\_  
Address \_\_\_\_\_

Thank you for your generosity to Upland Country Day School. This form is a confidential record and is provided to help you convey your charitable intent to Upland Country Day School so we can acknowledge you, and make sure your intentions are carried out properly.

### **Provision**

\_\_\_ I have made a bequest as an unrestricted gift to the Endowment, to Upland Country Day School, in my will/estate plans and I have enclosed a copy of that page from my will/estate plan as documentation for Upland.

(Optional: \_\_\_\_\_ % or \$ \_\_\_\_\_, designated as unrestricted for the Endowment, shall be bequeathed to Upland Country Day School through my estate.)

\_\_\_ I have named Upland Country Day School as the beneficiary of a:

\_\_\_ Trust

\_\_\_ Retirement Plan

\_\_\_ Life Insurance policy, naming Upland as Owner and Beneficiary.  
(Donor agrees to send Upland annual donation in amount of premium.)

\_\_\_ Other: \_\_\_\_\_

### **Acknowledgement**

\_\_\_ I am willing to be publicly acknowledged.

\_\_\_ I prefer not to be listed or acknowledged publicly.

Signature \_\_\_\_\_

Print Name \_\_\_\_\_

Date \_\_\_\_\_ Phone \_\_\_\_\_

*Please return your Estate Intention Form to: The Development Office,  
Upland Country Day School, 420 West Street Road, Kennett Square, PA 19348.*

*Questions? Please call the Development Office at 610-444-8114*