



MAKING A GIFT BY BEQUEST OR OTHER ESTATE PLAN TO COTTING SCHOOL

A bequest is one of the simplest and most meaningful gifts you can make to Cotting School. By including Cotting in your estate plans, you will join a long and honored tradition of giving, while helping to ensure a vibrant future for Cotting School, and the students and families whose lives are enriched here. A bequest or other gift from your estate may also help you to reduce or avoid estate taxes, and meet other personal and financial goals.

All bequest gifts, regardless of size, are a special legacy and are greatly appreciated.

We encourage you to share this information with your own qualified advisors. Please feel free to contact Elizabeth C. Peters, Director of Advancement, at (781) 862-7323 ext.178 or epeters@cotting.org, with questions, or to notify us of your plans. We would be glad to help you and your advisors create a gift that meets your individual needs and goals. All conversations about your plans will remain strictly confidential.

Those who have included Cotting in their plans via bequest, trust, retirement plan, life insurance policy or other arrangement, are warmly invited to membership in the **Francis Joy Cotting Circle**. Anonymous members are welcome.

TYPES OF BEQUESTS, AND SAMPLE WORDING

General Bequest. A bequest for general purposes at Cotting School will help us apply your gift to the School's highest priority needs at the time it is received. **Your bequest may be expressed as a specific sum of money, a specific percentage of your estate, or a specific item or asset.** Here is an example of how a general bequest may be worded:

"I give, devise, and bequeath to Cotting School, Inc., a Massachusetts charitable corporation, the sum of \$_____ (or fixed percentage or description of specific asset), for the benefit of Cotting School, Inc. for its general purposes."

Specific Bequest. If you intend to make a bequest for a specific purpose, such as our General Endowment, or to support scholarships, you may wish to use the following language:

"I give, devise, and bequeath to Cotting School, Inc. a Massachusetts charitable corporation, the sum of \$_____ (or fixed percentage or description of specific asset), for the benefit of Cotting School, Inc. to be used for the following purpose: (state the purpose). If in the judgment of the trustees of Cotting School, Inc. it is impossible or impracticable to carry out exactly the designated purpose, they shall determine an alternative purpose as near as possible to the designated purpose."

Residuary Bequest. If you intend to leave the residue portion of your assets after other terms of the will have been satisfied, you may wish to use the following language:

"All the rest, residue, and remainder of my estate, both real and personal, I give to Cotting School, Inc., a Massachusetts charitable corporation, for its general purposes."

Contingency Bequest. If you wish to make a contingency gift, so that Cotting School will receive a portion of your estate if your named beneficiary does not survive you, you may wish to use the following language:

"I devise and bequeath the residue of the property, real and personal and wherever situated, owned by me at my death, to (name of beneficiary), if (she/he) survives me. If (name of beneficiary) does not survive me, I devise and bequeath my residuary estate to Cotting School, Inc., a Massachusetts charitable corporation, for its general purposes."

MAKING COTTING SCHOOL A BENEFICIARY OF YOUR RETIREMENT PLAN OR LIFE INSURANCE POLICY

Making Cotting a beneficiary of your retirement plan or life insurance policy is often as simple as naming the School on a Beneficiary Designation Form, obtained from your plan administrator. Often such forms will ask you to provide the Tax Identification Number of a charitable beneficiary. Cotting's Tax ID # is 042104328.

ADDING COTTING SCHOOL TO YOUR EXISTING PLANS BY CODICIL

A codicil is a simple instrument that allows you to add a charitable beneficiary such as Cotting School to your existing plans. For a sample codicil to review with your advisors, please contact Elizabeth Peters, Director of Advancement.

INCLUDING COTTING SCHOOL AS A BENEFICIARY OF YOUR TRUST

If you are considering including Cotting as a beneficiary of an individual, family, charitable or other type of trust, some of the above sample wording may be useful to you and your advisors. If you have specific questions regarding a gift through a trust, establishing a charitable trust, or you would like to notify us of plans you have made, please contact the Advancement Office.

The **Tax Identification Number** of Cotting School is 042104328.

To discuss these or any giving options, please contact:
Elizabeth C. Peters, Director of Advancement
at (781) 862-7323 ext.178 or epeters@cotting.org.

Thank you!