

## Advisor's Guide for Planned Giving

### Gifts from Wills and Trusts:

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name Garrison Forest School in your will or trust please use the following suggested language:

**Residual Bequest Language** — A residual bequest comes to us after your estate expenses and specific bequests are paid.

*I give and devise to Garrison Forest School, located in Owings Mills, MD, 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).*

**Specific Bequest Language** — Naming Garrison Forest School as a beneficiary of a specific amount from your estate is easy.

*I give and devise to Garrison Forest School, located in Owings Mills, MD, the sum of \$ \_\_\_\_\_ (or asset) to be used for its general support (or for the support of a specific fund or program).*

**Contingent Bequest Language** — Garrison Forest School can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled.

*If (insert name) is not living at the time of my demise, I give and devise to Garrison Forest School, located in Owings Mills, MD, 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 specific fund or program).*

### Gifts of Appreciated Securities:

Please contact Carrie Stickel for a stock transfer form.

### Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to Carrie Stickel.

Legal Name: Garrison Forest School

Tax I.D. Number: 52-0591516

Incorporated In: Owings Mills, MD

### Note to Attorneys, Accountants and other professional Advisors:

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please contact Carrie Stickel, Director of Alumnae Leadership at 410-559-3130 or carriestickel@gfs.org.