



CHOATE ROSEMARY HALL

SAMPLE BEQUEST LANGUAGE

- **Residual Gift Language**

A residual bequest comes to us after your estate expenses and specific bequests are paid:

Sample: *I give and devise to Choate Rosemary Hall Foundation, Inc. (Tax ID #06-0910420), located in Wallingford, CT, 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 Gift Language**

Naming Choate Rosemary Hall as a beneficiary of a specific amount from your estate is easy:

Sample: *I give and devise to Choate Rosemary Hall Foundation, Inc. (Tax ID #06-0910420), located in Wallingford, CT, the sum of \$ _____ (or asset) to be used for its general support (or for the support of a specific fund or program).*

- **Contingent Gift Language**

Choate Rosemary Hall or its affiliates can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled: **Sample:** *If (insert name) is not living at the time of my demise, I give and devise to Choate Rosemary Hall Foundation, Inc. (Tax ID #06-0910420), located in Wallingford, CT, 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).*

- **Retirement Plan Beneficiary Language**

You may name Choate Rosemary Hall (Tax ID #06-0910420) as a beneficiary of your IRA or other qualified retirement benefits. Donors should consult with their tax advisor regarding the tax benefits of such gifts.

Naming Choate as the beneficiary of a qualified retirement-plan asset such as a 401(k), 403(b), IRA, Keogh, or profit-sharing pension plan will accomplish a charitable goal while realizing significant tax savings. It can be costly to pass such assets on to heirs because of heavy tax consequences. By naming Choate as a beneficiary of a retirement plan, the donor maintains complete control over the asset while living; but at the donor's death the plan passes to support Choate free of both estate and income taxes.

Making a charitable gift from your retirement plan is easy and should not cost you any attorney fees. Simply request a change-of-beneficiary form from your plan administrator. When you have finished, please return the form to your plan administrator and notify Choate Rosemary Hall. We can also assist you with the proper language for your beneficiary designation to Choate.

Customized Language

If you or your attorney would like Choate to provide you with customized beneficiary language that is specific to your goal and interest, please contact:

Cole Depuy

Advancement Officer

Choate Rosemary Hall

333 Christian Street

Wallingford, Connecticut 06492

(203) 697-2855

cdepuy@choate.edu