



NAMING GEORGE SCHOOL IN YOUR WILL OR TRUST

Naming George School in your will or trust is a meaningful way to imagine your legacy. The simplest form of gift planning—a bequest is a donor’s “ultimate gift”, the largest gift he or she is capable of. A bequest costs you nothing during your lifetime yet provides valuable support to George School.

Your gift may be a specific dollar amount, a percentage of your estate or the remainder after all other provisions are specified. Below is suggested language to take to your attorney for use in drafting your bequest.

Sample Language

Specific bequest: Name George School to receive a specific amount, asset, or percentage from your estate.

A fixed amount of money or a designated property

“I give and devise to George School located in Newtown, Pennsylvania, the sum of (_____ dollars) or (a specific asset) for its general purposes (or for the support of a specific program or fund, such as faculty support).”

A percentage of the estate

“I give and devise to George School located in Newtown, Pennsylvania, (_____ percentage) of my estate for its general purposes (or for the support of a specific program or fund, such as financial aid).”

Residuary bequest: Name George School to receive a percentage of the remainder of your estate—or your entire estate—after all other provisions have been satisfied.

“I give and devise to George School located in Newtown, Pennsylvania, _____ percentage (_____%) (or all) of the residue of my estate, including real and personal property, for its general purposes (or for a specific use, such as faculty support or financial aid, or for a specific academic program, such as the Arts Department).”