



THE WINSOR SCHOOL

Bequest Language

A gift to Winsor in your will or revocable trust enables you to support our important mission and make a difference in the lives of future generations of Winsor students.

A bequest:

- Is easy to arrange.
- Will not impact your current lifestyle.
- Can be easily modified to address your changing needs.

Residual Gift Language

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

I give and devise to The Winsor School, located in Boston, MA, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general purposes (*or* for the support of a specific fund or program*).

Specific Gift Language

Naming The Winsor School as a beneficiary of a specific amount from your estate is easy:

I give and devise to The Winsor School, located in Boston, MA, the sum of \$ _____ (*or* asset) to be used for its general purposes (*or* for the support of a specific fund or program*).

Contingent Gift Language

The Winsor 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 The Winsor School, located in Boston, MA, the sum of \$ _____ (*or* all or a percentage of the residue of my estate) to be used for its general purposes (*or* for the support of a specific fund or program*).

The Winsor School's tax identification number is: #04-2105842

*Please contact giftplanning@winsor.edu for help with bequest language to support a specific fund or program.

Retirement-Plan Beneficiary Language

You may name The Winsor School as a beneficiary of your IRA or other qualified retirement-plan asset such as a 401(k), 403 (b), Keogh, or profit-sharing pension plan. Donors should consult with their advisor(s) regarding the tax benefits of such gifts.

A charitable gift from your retirement plan is easy to arrange, will not impact your current lifestyle, can be modified in the future, and may not incur any attorney fees. Simply request a change-of-beneficiary form from your retirement-plan administrator. Please contact giftplanning@winsor.edu for help with beneficiary-designation language.