



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 Don Bosco Prep in your will or trust please use the following suggested language:

RESIDUAL GIFT LANGUAGE

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

I give and devise to Don Bosco Preparatory High School, located in Ramsey, NJ, 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 Don Bosco Prep as a beneficiary of a specific amount from your estate is easy:

I give and devise to Don Bosco Preparatory High School, located in Ramsey, NJ, 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

Don Bosco 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:

If (insert name) is not living at the time of my demise, I give and devise to Don Bosco Preparatory High School, located in Ramsey, NJ, 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 Dan Benvenuto, Vice President for Advancement, 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 Dan Benvenuto, Vice President for Advancement.

Legal Name: Don Bosco Preparatory High School

Tax ID Number: 47-4772938

Incorporated In: Ramsey, NJ

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 Dan Benvenuto at 201-327-8003 ext. 145 or dbenvenuto@donboscoprep.org.

Dan Benvenuto | Vice President, Advancement

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