



## CHRIST SCHOOL

### ANONYMOUS PLANNED GIFT CONFIRMATION

To: CHRIST SCHOOL

Professional Advisor: \_\_\_\_\_

Please be informed that on or about \_\_\_\_/\_\_\_\_/\_\_\_\_ one of my clients established in his/her estate planning documents a gift to Christ School. This confirmation is intended to outline the basic elements of that gift:

A. Client's Age or Date of Birth \_\_\_\_\_

B. Approximate Value of Gift \$ \_\_\_\_\_

C. Type of Gift:

- ☐ Bequest in Will or Living Trust
- ☐ Beneficiary Designation under Life Insurance Policy
- ☐ Beneficiary Designation in Retirement Savings or IRA
- ☐ Charitable Remainder Trust
- ☐ Charitable Lead Trust
- ☐ Donor Advised Fund at a Community Foundation
- ☐ Certificate of Deposit-Payable on Death (POD) to Christ School

D. Other Method - (Please describe)

\_\_\_\_\_  
\_\_\_\_\_

If you have any other pertinent information (such as the payout rate on a charitable trust), please provide this information.

\_\_\_\_\_  
\_\_\_\_\_

If your client has designated this gift for a particular use, please describe such use:

\_\_\_\_\_  
\_\_\_\_\_

Please be assured that Christ School holds all of this information in strict confidence, and the school pledges to you and your client that this information shall not be used for any other purpose other than to assist the school in estimating its long-term expectations in its planned giving program. Please thank your client for their support of Christ School. Their gift to the school will enhance the ability of Christ School to educate young men for generations.

Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_