



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 The Shipleys School in your will or trust please use the following suggested language:

Residual Bequest Language:

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

I give and devise to The Shipleys School, located in Bryn Mawr, PA, _____% of the rest, residue and remainder of my estate, both real and personal, to be used for its general unrestricted endowment.

Specific Bequest Language:

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

I give and devise to The Shipleys School, located in Bryn Mawr, PA, the sum of \$ _____ to be used for its general unrestricted endowment.

Contingent Bequest Language:

The Shipleys School 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 [name(s)] is not living at the time of my demise, I give and devise to The Shipleys School, located in Bryn Mawr, PA, the sum of \$ _____ [or _____% of the rest, residue, and remainder of my estate] to be used for its general unrestricted endowment.

Gifts of Appreciated Securities:

Shipleys's Broker: William B. Thompson, Financial Advisor, Wells Fargo Advisors

Wells Fargo Clearing Services, LLC

Phone: 610-832-7627 Email: william.thompson@wellsfargoadvisors.com

DTC#: 141 Account#: 7169-6699

Tax ID#: 23-1352677

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 Josephine Burri, Director of Development.

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 call contact Josephine Burri, Director of Development, at 610-581-4650 or jburri@shipleyschool.org