

NOTICE OF AN ESTATE GIFT BY MY WILL, TRUST, OR BENEFICIARY DESIGNATION

If you have included a bequest for Brookstone in your estate plan or a gift of your other non-probate property (i.e. IRA, retirement plan, life insurance, etc.), please let us know by completing this form so that we can be prepared to honor your wishes in the future and be able to thank you now.

YOUR INFORMATION

Donor 1

_____	_____	_____	_____	_____
First Name	MI	Last Name	Suffix	Date of Birth
_____		_____	_____	_____
Home Address		City	State	Zip
_____		_____		
Preferred Email		Preferred Phone [__ accepts text messages?]		

Donor 2

_____	_____	_____	_____	_____
First Name	MI	Last Name	Suffix	Date of Birth
_____		_____	_____	_____
Home Address		City	State	Zip
_____		_____		
Preferred Email		Preferred Phone [__ accepts text messages?]		

TYPE OF GIFT AND TERMS

____ A gift (bequest) in my/our will or trust

____ Life insurance policy with Brookstone named as a beneficiary

____ Retirement assets (IRA, 401(k), etc.) with Brookstone named as a beneficiary

____ Other: _____

My/our gift is ____ outright or ____ contingent

The estimated value of my/our gift is \$ _____

Special circumstances of my/our gift include:

RECOGNITION & MORE

Your gift encourages others to make a similar gift. However, if you prefer to remain anonymous, we will respect your wishes.

____ I/we agree to Brookstone publicly using our names and type of gift (not the amount) to encourage others in their generosity.

Please refer to me/us as: _____

____ I/we prefer to remain anonymous during my/our lifetime. However, Brookstone may publicly recognize my/our gift after it is received.

____ I/we prefer to remain anonymous during our and after my/our lifetime.

SIGNATURES

Donor 1

Name (please print)

Signature

Date

Donor 2

Name (please print)

Signature

Date

MAIL OR EMAIL BACK TO BROOKSTONE

Suzanne Wilson, Director of Major Gifts & Planned Giving
Brookstone Schools
P.O. Box 30696
Charlotte, NC 28230

704-392-6330 x122
suzanne.wilson@brookstoneschools.org