

DECLARATION OF INTENT

Thank you for including Portsmouth Abbey School in your estate plan. We are delighted to honor you as a member of the Manor House Society. Please note that membership in this society does not require disclosure of the information asked below. However, we hope you will share the details of your gift so that we may ensure your wishes are fulfilled. All information related to your gift will remain confidential.

New Gift

Updated Gift Information

Name: _____ Class: _____

Spouse Name (if joint gift): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Birth Date: _____

Email Address: _____

Phone Number: _____



Office of Development and Alumni Affairs

alumni@portsmouthabbey.org

401. 643.1269

I/We have provided for the future of Portsmouth Abbey School as set forth in my/our:

Will or Trust

Charitable Remainder Trust

Life Insurance Policy

Charitable Lead Trust

Retirement Plan or Beneficiary Designation (401(k), 403 (B), IRA, Brokerage Account

Other Assets (please describe):

Attached please find a copy of the page or paragraph from the will or trust bequest, beneficiary designation form for life insurance, or retirement plan that describes my gift provision.

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

My/our gift is _____ % of the asset indicated above. If a percentage is given, what is

the current estimated value of the percent in today's dollars: \$ _____

I/ We have signed a Gift Letter of Agreement with Portsmouth Abbey School stating the designation or purpose of our gift.

I/ We have not signed a Gift Letter of Agreement. It is my/our intention that Portsmouth Abbey School use this future gift as follows:

Unrestricted Gift: to be used by Portsmouth Abbey to address its most pressing needs at the time of receipt.

Restricted Gift: to support areas that speak to my/our philanthropic priorities.

Donors who provide a planned gift to Portsmouth Abbey School will be enrolled in the Manor House Society.

Yes, please list our names as follows:

No, I/we ask to remain anonymous.

If you wish to provide additional notes or comments regarding your gift, please do so below:

Signature

Date

Signature

Date

This document does not bind you or your estate. By signing this form, you are simply acknowledging your current plans to benefit Portsmouth Abbey School in the future and giving us guidance as to your wishes. The School recognizes that gift plans may change over time, and we hope you will notify us of any relevant changes in your plans. We very much appreciate your expression of support. Please return your completed form to:

The Office of Development & Alumni Affairs
Portsmouth Abbey School
285 Cory's Lane
Portsmouth, RI 02871
