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# 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 Malvern Prep in your will or trust please use the following suggested language:

**Residual Bequest** — A residual bequest comes to us after your estate expenses and specific bequests are paid.

*I give and devise to Malvern Preparatory School, located in Malvern, PA, 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 Bequest** — Naming Malvern Prep as a beneficiary of a specific amount from your estate is easy:

*I give and devise to Malvern Preparatory School, located in Malvern, PA, the sum of \$\_\_\_\_\_ (or asset) to be used for its general support (or for the support of a specific fund or program).*

**Contingent Bequest** — Malvern Prep 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 to Malvern Preparatory School, located in Malvern, PA,, 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 ask your broker to transfer your securities to:

Vanguard Brokerage Services at DTC-0062

for further credit to Account 52203073

in the name of Malvern Preparatory School.

Memo: Donor Name

## **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 the Development Office.

Legal Name: Malvern Preparatory School

Tax I.D. Number: 23-1352658

Incorporated In: Malvern, PA

## **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 the Development Office at 484-595-1110.