



steinerschool.org

LOWER SCHOOL
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HIGH SCHOOL
2230 Pontiac Trail
Ann Arbor, MI 48105
hs@steinerschool.org
ph 734.669.9394
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Thank you for your intention to include Rudolf Steiner School of Ann Arbor in your estate plan. In order to accurately document your intention, please complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation.

Recognition of Your Gift

- For recognition purposes, please list my/our name(s) as follows:

- Please do not include my/our name in any public listings of donors.
- I/We wish for my/our gift intention to be confidential and anonymous, publicly and in Rudolf Steiner School of Ann Arbor records.
- Gift Agreement/Letter** - I/We have signed a Gift or Letter Agreement with Rudolf Steiner School of Ann Arbor for this gift and have made no changes to the designation or purpose.
- No Gift Agreement/Letter** – Briefly describe allocation, designation, and how your gift should be used.

Description and Value of Gift - Please indicate below (by checking applicable options), how your future gift intention will be fulfilled and provide the estimated value for Rudolf Steiner School of Ann Arbor:

<u>Description</u>	<u>Amount or Percentage</u>	<u>Estimated Amount of Gift to Rudolf Steiner School</u>
<input type="checkbox"/> Will or Trust with a sum of	_____	_____
<input type="checkbox"/> Charitable Remainder/Lead Trust in the amount of	_____	_____
<input type="checkbox"/> Remainder of Retirement Fund/IRA with a total current value of	_____	_____
<input type="checkbox"/> Life Insurance Policy with a policy value at maturity of	_____	_____
<input type="checkbox"/> Charitable Gift Annuity in the amount of	_____	_____
<input type="checkbox"/> Other Item or Asset in the amount of Please describe (for example, private collections, real estate, securities, etc.):	_____	_____

- Beneficiary** – If Rudolf Steiner School is only a contingent beneficiary, please explain conditions:

- Documentation** - Please provide us with copies of any documents (or the relevant pages) that include provisions for Rudolf Steiner School.

Please complete reverse side

Contact Information

Will or Trust – If your gift is included in a will or trust, please provide the following:

Executor(s) or Trustee(s)

Name and Address

Phone and/or Email

Beneficiary Designation – If your gift is directed by a beneficiary designation, please provide the following:

Administrator or Company

Name and Address

Phone and/or Email

Other Information, Contacts and Relationships You Want Us to Know (family, attorney, etc.)

Name and Address

Phone and/or Email and Relationship

This Declaration of Intent will confirm your bequest to the school. You will be contacted by a member of our Development staff regarding your participation.

New Intention – This is a new bequest intention to Rudolf Steiner School of Ann Arbor.

Update to Intention – This is an update to a previously recorded bequest intention to Rudolf Steiner School of Ann Arbor

Signature Date

Print Name

Street Address

City, State, Zip

Email and Phone Number

Signature Date

Print Name

Street Address

City, State, Zip

Email and Phone Number

Please send this form (together with copies of any relevant documents) to the Development Office. Please contact us if you have any questions or concerns.

Rudolf Steiner School of Ann Arbor, Development Office
2230 Pontiac Trail, Ann Arbor, MI 48105
Email: kklaphake@steinerschool.org
Phone: 734-669-9394