



THE HOTCHKISS SCHOOL
TOWN HILL SOCIETY

Membership Form

In recognition of my strong belief and confidence in the work of The Hotchkiss School, I, _____, confirm that I have taken—or will take—steps to make a planned gift to benefit the School.

(If any of the information requested on this form is of a confidential nature, please indicate so on this form, accordingly.)

Name _____

Phone _____

Address _____

Email address _____

City _____

Date of birth _____

State _____ Zip _____

Hotchkiss affiliation _____

I have made the following provision for Hotchkiss in my estate plan:

Bequest

- Residuary bequest: Hotchkiss's percentage of residual value of my estate is _____ %
The estimated value of this bequest is \$ _____
- Outright bequest in my Will \$ _____
- Bequest subject to conditions (please describe)

Remainder Trust

Present size of trust principal \$ _____
The Hotchkiss School's percentage of remainder interest _____ %
Trustee (if other than Hotchkiss) _____

Lead Trust

Present size of trust principal \$ _____
The Hotchkiss School's percentage of lead interest _____ %
Trustee (if other than Hotchkiss) _____

Life Insurance Policy

Policy face amount \$ _____
Current cash value \$ _____
Policy Number _____
Name of Insurance _____
Type of policy _____

Hotchkiss's interest in this policy is subject to the following conditions:

Charitable Gift Annuity/Pooled Income Fund Gift

Date annuity/pooled income fund account was established _____
Original gift amount of annuity/pooled income fund \$ _____
Current value of account \$ _____

Other Planned Gifts (please describe)

Purpose of This Gift to Hotchkiss

- Unrestricted support for The Hotchkiss School
- Restricted support to benefit _____
- Other restrictions _____

Please include me as a member of the Town Hill Society with the opportunity to participate in any and all special programs available to Town Hill members. Also, please list my name (and/or my spouse's name) in the Town Hill Society in the following manner:

I prefer that you not include my name in the published list of Town Hill Society members and that this gift be considered anonymous for public purposes.

Signature _____

Date _____

For more information:

www.hotchkiss.planyourlegacy.org