

Thank you for considering how you might join with Hathaway Brown School to educate young women to learn, lead, and care for their communities through your estate giving. Please review this form to assist you in thinking through this generous act of philanthropy.

Through your will, your gift can be expressed in many ways. Here are four common ones:

1. As a specific amount.
2. As a percentage of your estate.
3. As the entirety of your estate after all specific bequests have been distributed (a residuary bequest).
4. As a specific piece of property (either tangible property or real estate).

The information below will assist you as you either create your will and include HB in it or modify your existing will and add a bequest provision for HB to it through use of a codicil. (A codicil is essentially a legal addition or supplement that explains, modifies, or revokes part of an existing will.) Please consult an attorney for legal requirements when creating your will or codicil.

When including a bequest provision in your will, always use Hathaway Brown School's full legal name and provide the federal taxpayer identification number.



Our full legal name is: "Hathaway Brown School"



Our federal taxpayer identification number is: 34-0714426

When creating a codicil, also use the legal name and taxpayer identification number.

The following language – subject to personalization and modification to fit your particular circumstances – may be used as a guide to making your bequest intentions known:

I give and bequeath to Hathaway Brown School, federal taxpayer identification number 34-0714426, ...

... the sum of \$_____.

[or] ... the following described property: _____.

[or] ... _____% of my estate.

[or] ... the residue of my estate.

Possible for a codicil: In all other respects I confirm my said will.

NOTE: Talk with your attorney about signing, dating, and having execution of your will and/or codicil witnessed or notarized.

Please consider sharing your intentions with us so that we may appropriately thank you!

Options you may consider for specifying the purpose of the gift or expressing your preferences:

- Where the need is greatest.
- With a preference for _____ [fund, program, equipment, building, scholarship, etc.].
- Designated for _____ [fund, program, equipment, building, scholarship, etc.].

While legal guidance cannot be provided by the Advancement Office at Hathaway Brown, we are happy to assist you with any questions as we are able. Please contact Clarke Leslie '80, Director of Advancement, at cleslie@hb.edu or (216) 320-8115. **Again, thank you for your philanthropy.**