CONFIRMATION OF DEFERRED GIFT

This form is offered as an aid in providing the specific language and the estimated value of a provision in your estate plans or other deferred gift to Trident Academy. You also can provide this information by sending a letter signed by you or your attorney. By supplying these details of the gift provision contained in your will, trust, life insurance policy or retirement account beneficiary designation, you can help ensure that your gift is administered according to your wishes. Any information you provide about your estate plans will be retained in Trident Academy's confidential files. Please contact the Advancement Office for any questions you may have.

Name: _____

Address: _____

Gift Type ☐ Will Bequest ☐ Revocable Living Trust ☐ Retirement Account ☐ Life Insurance ☐ Other _____

(Please attach a copy of the pertinent page from the document that establishes your gift, OR write in the space below to note the exact language of the provision:

Gift Value: The current estimated value of my gift is $_____, which represents a specific dollar amount or _____% of my estate. (For percentages and remainders of an estate, please provide a good faith estimate of the dollar value as of the date this form is signed. By doing so you permit us to apply this amount to our fund raising goals. Providing this estimated amount in no way obligates you.)

Gift Designation: I/we would like this gift to be used as follows:

___ undesignated, for the greatest needs of Trident Academy

___ designated according to the attached instructions

Disclosure: In order to promote support for Trident Academy, we appreciate the opportunity to publicize donors' names and gifts from time to time. This documentation of your deferred gift will entitle you to recognition through the deferred gift society and have your name listed with others who have established gifts to Trident Academy through their estate plans, life insurance, retirement accounts, or other similar gifts. Indicate below how you would like to be listed:

☐ Yes, you may list my name and gift information. I would like for my/our name(s) to appear in print as:

_____

☐ Yes, but list me as "anonymous" if dollar amounts are mentioned

☐ No, do not list my gift information.

☐ No, I do not want my name publicly listed as a member of Trident Academy's deferred giving society.

_____	_____	_____
Date	Signature	Date of Birth
_____	_____	_____
Date	Signature	Date of Birth

(Dates of birth are useful in assigning a current value to your gift based on life expectancy tables.)

THIS IS NOT A BINDING LEGAL DOCUMENT. Your signature verifies only that the above information is accurate as of this date. Trident Academy recognizes that values of deferred gifts as well as the provisions themselves may change over time.