



## Bequest Language

A gift to Collegiate School through your will or revocable trust is a meaningful way to support current and future Cougars. A bequest offers several important benefits:

- It is simple to arrange.
- It allows you to designate future support.
- It can be modified as your circumstances change over time.

Planning for the future and defining the legacy you wish to leave is one of the most effective ways to ensure a lasting impact. By including Collegiate School in your will or living trust, you help guarantee that your commitment to education endures for generations to come.

Your bequest may take many forms: it can be a specific dollar amount, a percentage of your estate, or the remainder after all other provisions have been fulfilled.

Collegiate School's Federal Tax ID Number: 54-0528203

Below is suggested language to assist you and your advisor when drafting your bequest.

---

### Sample Language

#### Unrestricted Bequest

For a gift that allows Collegiate School to address its most pressing needs:

“I give to Collegiate School, a nonprofit corporation currently located at 103 N. Mooreland Road, Richmond, VA 23229, or its successor thereto, \_\_\_\_\_ [written amount, percentage of the estate, or description of property], for its unrestricted charitable purposes.”

---

#### Restricted Bequest

To designate your gift for a specific purpose:

“I give to Collegiate School, a nonprofit corporation currently located at 103 N. Mooreland Road, Richmond, VA 23229, or its successor thereto, \_\_\_\_\_ [written amount,

percentage of the estate, or description of property]. This gift shall be used for (state purpose) if and so long as Collegiate determines that the need exists. If Collegiate determines at the outset or at a later time that the need does not exist, no longer exists, or it is not possible or prudent to administer my gift as originally intended, then Collegiate may, in its sole discretion, direct the use of my bequest to a purpose as closely aligned as possible with my original intent.”

---

If you have included Collegiate School in your estate plan, we would be grateful if you would let us know. Sharing your intentions allows us to plan responsibly for the future and ensure your gift is used in accordance with your wishes. If you prefer to remain anonymous, your information will be kept strictly confidential.

For more information, please contact:

Maria Cobb

Associate Director of Development

804-754-7360

[mcobb@collegiate-va.org](mailto:mcobb@collegiate-va.org)

---

*The above language is provided for illustrative purposes only. We encourage you to consult with your attorney or financial advisor to ensure your plans are properly structured and aligned with your goals.*