



# DECLARATION OF BEQUEST INTENTION

**As an expression of my/our commitment to HOLDERNESS SCHOOL, I/we have made provisions in my/our will or trust to support Holderness School as follows:**

**Bequest Information (*please choose one*):**

- ☐ Specific Dollar Amount: \$ \_\_\_\_\_ OR \_\_\_\_\_% of the residue of property owned at my death. Estimated value in today's dollars: \$ \_\_\_\_\_
- ☐ Retirement Plan Beneficiary Designation: Estimated value in today's dollars: \$ \_\_\_\_\_
- ☐ Life Insurance Policy Beneficiary Designation: Estimated value in today's dollars: \$ \_\_\_\_\_
- ☐ Other asset(s) & estimated value in today's dollars: \_\_\_\_\_ & \_\_\_\_\_

**Beneficiary Designation (*please choose one*):**

- ☐ Holderness School is the Primary Beneficiary
- ☐ Holderness School is the Contingent Beneficiary

My/Our Primary Beneficiary is \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_

Use of this bequest (e.g., unrestricted support, scholarship support, etc.) \_\_\_\_\_

- Holderness School suggests but does not require that you include a copy of the portion of your will or other estate document that names Holderness as a beneficiary.
- This declaration of intent is an expression of my/our present plans, is subject to revocation or modification, and is not legally binding in any way.

\_\_\_\_\_  
**Name (*Please print*)**

\_\_\_\_\_  
**Date of Birth**

\_\_\_\_\_  
**Name (*Please print*)**

\_\_\_\_\_  
**Date of Birth**

\_\_\_\_\_  
**Address**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Signature**

- ☐ Check here if you would like your bequest intention to remain anonymous.

**Name(s) for publication in the Balch Legacy Society:** \_\_\_\_\_