



Bequest Language

A bequest — a gift in your will — is a simple and convenient way to create your own legacy at The Ethel Walker School. Your bequest can be a specific dollar amount or a percentage of your estate. Your bequest may be given for general use, or you can designate a specific purpose.

Many alumni, faculty, staff, parents, and friends establish endowments that honor the memory of a family member, a loved one, a classmate, or a beloved faculty member. Endowments live forever because only a portion of the fund's earnings are available for spending annually.

Examples of various types of bequests:

Unrestricted bequests are the most impactful and provide the institution's leaders with the capacity to be agile in navigating fiscal challenges and opportunities.

Specific bequests are used to make a gift of a specific dollar amount or specific asset (such as securities, real estate, or personal property).

Residuary bequests are used to give all or a portion of the remainder of your estate after payment of expenses and any specific amounts designated to other beneficiaries.

Including The Ethel Walker School in your will:

The following includes several examples of suggested bequest wording to benefit The Ethel Walker School. Each individual situation is unique, and these examples include only some of the possible gift opportunities. We encourage you to discuss your intentions with us. Because a will is an important legal document, you should also seek an attorney's help.

Percentage of estate for unrestricted purposes: "I give to The Ethel Walker School, a nonprofit organization located at 230 Bushy Hill Road, Simsbury, CT 06070 (Federal Tax ID Number 06-0689699), _____ percent (%) of the remainder of my estate to advance its education mission."

Percentage of estate to establish an endowed fund: "I give to The Ethel Walker School, a nonprofit organization located at 230 Bushy Hill Road, Simsbury, CT 06070 (Federal Tax ID Number 06-0689699), _____ percent (%) of the remainder of my estate to establish the _____ Endowed



Fund. The portion of this fund available for spending each year shall be used to _____. Contributions may be added to the Fund at any time. If changed circumstances should at some future time make it impossible or impractical to carry out exactly the above purpose in the above manner, then The Ethel Walker School Board of Trustees may change the purpose and manner as near as is practical to the original intent.”

Specific amount for unrestricted purposes: "I give to The Ethel Walker School, a nonprofit organization located at 230 Bushy Hill Road, Simsbury, CT 06070 (Federal Tax ID Number 06-0689699), the sum of \$_____ in cash (or _____ shares of _____ stock) to advance its education mission."

Specific amount for specific purposes: "I give, devise, and bequeath to The Ethel Walker School, a nonprofit organization located at 230 Bushy Hill Road, Simsbury, CT 06070 (Federal Tax ID Number 06-0689699), the sum of \$_____ in cash or in-kind (or _____ shares of _____ stock) to be used for _____ at The Ethel Walker School. If changed circumstances should at some future time make it impossible or impractical to carry out exactly the above purpose in the above manner, then The Ethel Walker School may change the purpose and manner as near as is practical to the original intent.”

Designating the purpose of a bequest:

Unrestricted: The most impactful bequest is unrestricted, allowing the funds to be used wherever The Ethel Walker School's need is greatest and enhancing the School's future ability to be fiscally resilient and, most important, remain committed to our girls' learning mission.

Restricted: You may designate your bequest gift to support a special program or purpose that reflects your interests (specific departments, professorships, endowment, or scholarships). If the bequest is restricted to a specific purpose, it is important that the following wording be added at the end of the provision. This will ensure that, in the remote possibility a specified purpose may cease to need funds in the future, an alternate use for the bequest may be determined.

"If changed circumstances should at some future time make it impossible or impractical to carry out exactly the above purpose in the above manner, then The Ethel Walker School's Board of Trustees may change the purpose and manner as near as is practical to the original intent.”