



Sample Bequest Language for Your Will or Revocable Living Trust

A gift to Dalton in your will or revocable trust is a simple and convenient way to support the School's mission and make a difference in the lives of future generations. A bequest is easy to arrange, will not alter your current lifestyle in any way, and can be easily modified to address your changing needs. The following examples are merely illustrative; please contact an estate attorney to ensure the language in your will or trust is precise, legally sound, and reflects your specific intentions.

Residual Gift Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to The Dalton School, located in New York, NY, _____% of the rest, residue, and remainder of my estate, both real and personal, to be used for its general unrestricted endowment (or for the support of a specific fund or program).

Specific Gift Language

You can name Dalton as a beneficiary of a specific amount from your estate:

I give and devise to The Dalton School, located in New York, NY, the sum of \$_____ (or asset) to be used for its general unrestricted endowment (or for the support of a specific fund or program).

Contingent Gift Language

You can name Dalton as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to The Dalton School, located in New York, NY, the sum of \$_____ (or all or a percentage of the residue of my estate) to be used for its general unrestricted endowment (or for the support of a specific fund or program).

Retirement Plan Beneficiary Language

You may name The Dalton School as a beneficiary of your IRA or other qualified retirement benefits. Donors should consult with their tax advisor regarding the tax benefits of such gifts.

Naming Dalton as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh, or profit-sharing pension plan will accomplish a charitable goal while realizing significant tax savings. It can be costly to pass such assets on to heirs because of heavy tax consequences. By naming Dalton as a beneficiary of a retirement plan, the donor maintains complete control over the

asset while living, but at the donor's death the plan passes to support Dalton free of both estate and income taxes.

Making a charitable gift from your retirement plan is easy and should not cost you any attorney fees. Simply request a change-of-beneficiary form from your plan administrator. When you have finished, please return the form to your plan administrator and notify The Dalton School. We can also assist you with the proper language for your beneficiary designation to Dalton.

Dalton's tax identification number is: 13-2751872.