

“Yes, I would like to make a generous gift, but I need all of my money.”

YOUR GIFT

A Bequest to Sidwell Friends: A bequest is the simplest type of planned gift to make and one of the easiest to implement. Often, a bequest can be provided by adding a codicil to an existing will. Bequests help to ensure that Sidwell Friends can meet its endowment and capital needs in the future without affecting your cash flow or assets during your lifetime. Many donors prefer voluntary philanthropy after their death rather than involuntary giving to the government through estate taxes.

YOUR PHILANTHROPY

- **Support Sidwell Friends:** The School will receive a gift of a specific amount or a specific percentage of your estate at death.
- **Create a meaningful memorial:** You will have the satisfaction of making a significant gift. If you designate your gift for endowment, it will **provide income** to the School in perpetuity. You can make this gift **in honor or in memory** of someone you select. You also may designate the use of the bequest funds as long as your request is in harmony with the mission and priorities of the School.

YOUR BENEFITS

- **Preserve flexibility:** You continue to control and use your assets for living expenses or other costs during your lifetime.
- **Avoid estate tax:** The amount that passes to the School will be removed from your estate and therefore will not be subject to a federal or state estate tax upon your death. These tax savings can be substantial; in a large estate, they may be more than half the value of the bequest.
- **Recognition in perpetuity:** During your lifetime and in perpetuity, you will be recognized annually on the School's web site, in annual reports, and at special events as a member of The Thomas and Frances Sidwell Society. Or, if you prefer, your gift can be anonymous.

YOUR OPTIONS

In your will, you can designate a gift of:

- A fixed amount
- All or a percentage of your estate
- A contingent bequest
(e.g. “If my spouse does not survive me...”)
- A gift of real or personal property

For specific bequest language, go to:

plannedgiving.sidwell.edu.

All donors are encouraged to confer with their own financial planners or attorneys.

Sidwell Friends

3825 Wisconsin Avenue NW
Washington, DC 20016

For additional information on how to create your legacy as part of the Thomas and Francis Sidwell Society, please visit us online at **plannedgiving.sidwell.edu**.