

“Yes, I would like to support Sidwell Friends without changing my current lifestyle.”

YOUR GIFT

Retirement assets: It is a future gift.

You give to Sidwell Friends all or a portion of the balance remaining at death in your IRA, 401(k), or a profit-sharing or pension plan.

The School receives the funds free of tax.

YOUR PHILANTHROPY

- **Support Sidwell Friends:** The School will receive its share of the remaining retirement assets upon your 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 retirement funds as long as your request is in harmony with the mission and priorities of the School.

YOUR BENEFITS

- **Tax savings:** If, instead, these retirement benefits were left to heirs, the funds they receive would be reduced by both an estate tax and an income tax which when combined might be as high as 65 percent.
- **New use:** You can redirect to the School benefits which your heirs may no longer need.
- **Recognition in perpetuity:** During your lifetime and thereafter, you will be recognized annually on the School's website, 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

- **Alternative for heirs:** In lieu of retirement benefits, you can leave your heirs a more tax-efficient gift such as a bequest of cash or securities.

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