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Bequest Form:

Thank you for your intention to include the Freeport High School Scholarship Foundation in your estate plan. In order to accurately document your intention, please complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation.

Recognition of Your Gift

For recognition purposes, please list my/our name(s) as follows:

- ☐ Please include my/our name in any public listings of donors.
- ☐ I/We wish for my/our gift intention to be confidential and anonymous.
- ☐ **Gift Agreement/Letter** – I/We have signed a Gift or Letter Agreement with the Freeport High School Scholarship Foundation for this gift and have made no changes to the designation or purpose.
- ☐ **No Gift Agreement/Letter** – Briefly describe allocation, designation, and how your gift should be used.

Description and Value of Gift – Please indicate below (by checking applicable options), how your future gift intention will be fulfilled and provide the estimated value for the Freeport High School Scholarship Foundation

Description	Amount or Percentage	Est. Amount of Gift to FHSSF
<input type="checkbox"/> Will or Trust with a sum of		
<input type="checkbox"/> Charitable Remainder Trust in the amount of		
<input type="checkbox"/> Remainder of Retirement Fund/ IRA with a total current value of		
<input type="checkbox"/> Life Insurance Policy with a policy value at maturity of		
<input type="checkbox"/> Other Item or Asset in the amount of. Please describe (eg, private collections, real estate, securities, etc.):		

Beneficiary – If the Freeport High School Scholarship Foundation is only a contingent beneficiary, please explain conditions.

Documentation – Please provide us with copies of any documents (or the relevant pages) that include provisions.

Contact Information

Will or Trust – If your gift is included in a will or trust, please provide the following:

Personal Representative(s) or Trustee(s)

Name and Address

Phone and/or Email

Beneficiary Designation – If your gift is directed by a beneficiary designation, please provide the following:

Administrator or Company

Name and Address

Phone and/or Email

Other Information – Contacts and relationships you want us to know (family, attorney, etc.)

Name and Address

Phone and/or Email

☐ **New Intention** –This is a new bequest intention to the Freeport High School Scholarship Foundation.

☐ **Update to Intention** –This is an update to a previously recorded bequest intention to the Freeport High School Scholarship Foundation.

Signature

Date

Print Name

Street Address

City, State, Zip

Email and Phone

Signature

Date

Print Name

Street Address

City, State, Zip

Email and Phone

We strongly encourage you to visit your estate planning advisor to make sure you properly include your gift in your estate planning documents or beneficiary designation.

Please send this form (together with copies of any relevant documents) to the Freeport High School Scholarship Foundation, PO Box 431, Freeport, ME 04032. Please contact us via email if you would like to set up a meeting to discuss questions or concerns confidentially. info@fhsscholarships.org