



Mary Institute & Saint Louis Country Day School
Confidential Membership Form and Declaration of Intent

Thank you for including MICDS in your estate plans. To confirm your membership in the Eliot & Thompson Society, please fill out this confidential form and return to the address below.

I/We have included MICDS in my/our will or revocable trust\*:

- Specific Bequest in the amount of \$
Percentage Bequest at % of my estate, which is estimated at \$

\*Note: remote contingencies do not qualify for membership

I/We have named MICDS as a beneficiary of:

- Life Insurance Policy with a Face Value of \$ Cash Value of \$
Retirement Plan (IRA, 401k, 403b, SEP)
MICDS interest: % Current value of plan: \$
MICDS is (check one) Primary Beneficiary or Secondary Beneficiary
Real Estate

I/We have named MICDS in a charitable trust:

- Charitable Remainder Unitrust
Market Value: \$ MICDS Interest: % Payout: %
Charitable Remainder Annuity Trust
Market Value: \$ MICDS Interest: % Payout: \$
Charitable Lead Annuity Trust
Market Value: \$ MICDS annuity: \$ # of Years:

My/Our future gift is (check one):

- Unrestricted (unrestricted gifts are added to the Endowment)
Designated for a specific program or purpose (please specify):

Yes, a copy of the portion of my/our will, Trust Agreement, or Change of Beneficiary Form that applies to MICDS is attached for your confidential files.

Yes, I/we authorize the School to include my/our name(s) on the membership list of the Eliot & Thompson Society. I/We wish to be listed as (please print clearly):

Signature #1: Date: Date of Birth:

Please Print Name:

Signature #2: Date: Date of Birth:

Please Print Name: