



MY LEGACY GIFT FOR ANDOVER

Donor Information

Name _____ Class year _____

Spouse name _____ Class year _____

Address _____

City _____ State _____ Zip _____

Gift Intention

I/We have included Phillips Academy as a beneficiary in the following way(s):

- ☐ Will ☐ Donor-advised fund ☐ IRA, 401(k), or other retirement plan
☐ Trust ☐ Life insurance policy ☐ Other (please specify) _____

Estimated gift amount \$ _____

(You don't need to know the exact amount; only your good-faith estimate is required.)

I/We would like my/our gift directed to:

- ☐ Wherever it is needed most (unrestricted)
☐ Other purpose (please specify) _____

Will this gift to Andover be distributed following the death of any additional persons?

If so, whom (e.g. spouse, child, or sibling)?

Recognition Preferences

My name will be included in listings of the Samuel Phillips & Sarah Abbot Society including the Academy's digital Honor Roll.

No details of my intention will be made public.

- ☐ OK ☐ I/We prefer to be anonymous in our donor listings.

Signature _____ Date _____

Signature _____ Date _____

Questions?

Contact Grace Curley '81, Director of Gift Planning, 978-749-4281 or gcurley@andover.edu or Signe Lindberg, CFRE, Associate Director of Gift Planning, at 978-749-4529 or slindberg@andover.edu. You can also reach us by mail: Phillips Academy, Office of Gift Planning, McKeen Hall, Andover, MA 01810.

Andover recognizes that both the value of estate-related gifts and the provisions themselves may change over time. This form is used for gift recognition purposes only, and it does not bind your estate or heirs in any way.