



FORDHAM PREPARATORY SCHOOL

Faith, Scholarship, Service

Advisor's Guide for Planned Giving

Gifts from Wills and Trusts:

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name Fordham Preparatory School in a will or trust please use the following suggested language:

Residual Bequest Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give, devise and bequeath to Fordham Preparatory School (Tax ID #13-2660346), located in Bronx, NY, [written amount or percentage of the estate or description of property] to be used for the furtherance of its charitable purposes in the discretion and at the direction of its Board of Trustees for its unrestricted use and purpose.

Specific Bequest Language

You can also name Fordham Prep as a beneficiary of a specific amount from your estate:

I give, bequeath, and devise to Fordham Preparatory School (Tax ID #13-2660346), located in Bronx, NY, the sum of \$_____, (or, ____ percent of the rest, residue and remainder of my estate) to be used to support _____ (the intended area of your gift). In the event the need to support _____ no longer exists, I hereby authorize this bequest for a purpose in keeping with the spirit of this gift in the best interest of Fordham Preparatory School.

Contingent Bequest Language

Fordham Prep can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to Fordham Preparatory School (Tax ID #13-2660346), located in Bronx, NY, the sum of \$ _____ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).

Gifts of Appreciated Securities:

Legal Name: Fordham Preparatory School
Tax I.D. Number: 13-2660346
DTC Number: 0188
Account #: 914049622
Incorporated in: Bronx, NY

To transfer securities electronically:
TD Ameritrade, Inc.
Account Name: Fordham Preparatory School
Account # 914049622
DTC# 0188
Tax I.D. Number: 13-2660346

Contact:
Daniel D. Hickey '84
Stepping Stone Management, LLC.
PO Box 263
Bronx, NY 10464
Phone: 646-723-6262
Email: danhickey@ssmgt.net

For Gifts of Securities, please contact Ann Marie Denning at 718-367-7500, x251 or denninga@fordhamprep.org.

Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send us a copy.

Note to Attorneys, Accountants and other Professional Advisors

Thank you for helping your client with their charitable planning. Fordham Prep's Office of Engagement, Development & Communications is available to discuss with you or your client, their charitable intentions to help ensure the gift makes the desired impact. If you need information or if you have any questions or concerns, please contact Suzanne Dowden, at 718-367-7500 ext. 274 or dowdens@fordhamprep.org.