



Commonwealth School

Estate Gifts for Commonwealth School

A gift through your estate allows you to make a lasting impact on Commonwealth's educational mission. There are a variety of ways to make an estate gift, including a gift of a specific dollar amount or a particular asset. Alternatively, you might wish to leave Commonwealth all or a certain percentage of the remainder of your estate after providing for family members and other beneficiaries. You may stipulate whether your gift is unrestricted—to be used where it is needed most—or to be designated to one of our named funds. In addition to cash and securities, estate gifts may include real estate, tangible personal property such as jewelry and works of art, or virtually anything of value. You might also make Commonwealth the beneficiary of your life insurance policy, Individual Retirement Account, or other account that permits you to name a beneficiary.

I would like to include Commonwealth in my estate plans. What steps should I take?

When making or revising your will, trust, or other estate planning document, you should obtain the assistance of a lawyer or tax adviser—Commonwealth School does not offer legal or tax advice. We are available to work with your lawyer and/or adviser to ensure your charitable intentions are clearly stated and can be implemented by Commonwealth. This is especially important if you plan to establish an endowed fund with your gift.

What language should I use to designate a gift to Commonwealth in my will?

Gifts of specific property, personal property, or percent of estate

"I give and devise (\$_____ or _____% of estate), to The Commonwealth School, Inc., a Massachusetts charitable corporation located at 151 Commonwealth Avenue, Boston, Massachusetts, to be applied for its general charitable purposes."

Gifts of real estate

"I give and devise all of my right, title, and interest in and to the real estate located at (give address or describe property), to The Commonwealth School, Inc., a Massachusetts charitable corporation located at 151 Commonwealth Avenue, Boston, Massachusetts, to be applied for its general charitable purposes."

Gifts of share or residue of estate

"I devise and bequeath (\$_____ or _____%) of the remainder of my property, to The Commonwealth School, Inc., a Massachusetts charitable corporation located at 151 Commonwealth Avenue, Boston, Massachusetts, to be applied for its general charitable purposes."

Conditional gifts

"If my husband/wife does not survive me, I give and devise (\$_____ or _____% of the residue), to The Commonwealth School, Inc., a Massachusetts charitable corporation located at 151 Commonwealth Avenue, Boston, Massachusetts to be applied for its general charitable purposes."

I would like to designate my gift for a specific purpose. How do I go about doing this?

If your gift is to be made to a specific purpose or named fund, we are pleased to work with you and your lawyer to draft language in order to accomplish your wishes.

Is there anything else I should know?

Commonwealth School's tax identification (501(C) (3)) number is **04-2228167**.

Any donor who establishes one or more planned gifts to The Commonwealth School is recognized as a member of **The Hancock Society**. Established in 2016, The Hancock Society honors those who have made efforts to benefit the future of Commonwealth by making a planned gift.

If you have further questions and/or are interested in exploring other forms of planned gifts, please contact:

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