



# Middlesex



Thank you for including Middlesex in your estate plans. Please fill out this confidential form and return it to the address listed at the end of this document or by email attachment to confirm your membership in the Winsor Society. The information you share with us is kept in the strictest confidence and is subject to the authorizations you provide below. Created in 1996, The Frederick & Mary Winsor Society recognizes the generosity of those alumni, parents, grandparents, and friends of Middlesex who have included the School in their estate plans. These planned gifts signify a partnership with Middlesex in its mission to provide an excellent educational experience for its students. All planned gifts, such as bequests and deferred gifts qualify a donor for membership in this society.

## TYPE OF GIFT

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

- ☐ Specific Bequest      Amount: \$ \_\_\_\_\_
- ☐ Percentage Bequest      Percentage \_\_\_\_\_ % Est. value: \$ \_\_\_\_\_
- ☐ Other (describe):

*\*Note: remote contingencies do not qualify for membership*

### I/We have named Middlesex as a beneficiary of:

- ☐ Life insurance Policy      Face Value: \$ \_\_\_\_\_ Cash Value: \$ \_\_\_\_\_  
Middlesex is (check one): \_\_\_\_\_ Primary Beneficiary \_\_\_\_\_ Secondary Beneficiary
- ☐ Retirement Plan (IRA, 401k, 403b, SEP)  
Middlesex interest: \_\_\_\_\_ % Current value of plan: \$ \_\_\_\_\_
- ☐ Middlesex is (check one): \_\_\_\_\_ Primary Beneficiary \_\_\_\_\_ Secondary Beneficiary
- ☐ Donor Advised Fund or Other (describe):

### I/We have named Middlesex in a charitable trust:

- ☐ Charitable Remainder Unitrust  
Market Value: \$ \_\_\_\_\_ Middlesex interest: \_\_\_\_\_ % Payout: \_\_\_\_\_ %
- ☐ Charitable Remainder Annuity Trust  
Market Value: \$ \_\_\_\_\_ Middlesex interest: \_\_\_\_\_ % Payout: \$ \_\_\_\_\_
- ☐ Charitable Lead Annuity Trust  
Market Value: \$ \_\_\_\_\_ Middlesex annuity: \$ \_\_\_\_\_ No. of years: \_\_\_\_\_
- ☐ Other (describe):

**PURPOSE OF GIFT**

My/Our future gift is (check one):

- ☐ Unrestricted  
☐ Designated for a specific program or purpose (specify):

**DOCUMENTATION**

- ☐ **Yes!** A copy of the portion of my/our will that applies to Middlesex, or the trust agreement or Change of Beneficiary Form in which the School is named, is attached hereto for your confidential files.

**AUTHORIZATION FOR USE OF NAME**

- ☐ **Yes!** I/we authorize the School to include my/our name(s) on the membership list of *The Winsor Society* in official publications and on public recognition devices. I/we understand that this authorization is limited to the use of my/our names(s) only, and that the type and amount of my/our gift will remain strictly confidential.
- ☐ I/we prefer to remain anonymous.

**HOW I/WE WISH TO BE LISTED (Please Print):**

\_\_\_\_\_  
SIGNATURE #1

\_\_\_\_\_  
DATE

\_\_\_\_\_  
Please print name

\_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
SIGNATURE #2 (if applicable)

\_\_\_\_\_  
DATE

\_\_\_\_\_  
Please print name

\_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Date of Birth

PLEASE RETURN THIS FORM TO:  
Middlesex Alumni & Development Office  
Attn: Winsor Society  
1400 Lowell Road  
Concord, MA 01742