



Lawrence Schools Foundation

ESTATE PLANNING FORM

Date \_\_\_\_\_

I/We have made a provision for the Lawrence School Foundation in my/our estate plans for the support of the Lawrence Public Schools. The gift is best described as:

\_\_\_\_\_ A gift in my/our Will

\_\_\_\_\_ A Trust

\_\_\_\_\_ A life insurance policy

\_\_\_\_\_ A gift as a beneficiary of my retirement plan (IRA, 401k, 403b, etc.)

\_\_\_\_\_ Other

Please provide a brief description of the above-mentioned gift (i.e. the Lawrence Schools Foundation listed as a beneficiary of a specific bequest in my Will; I've included a provision in my Living Trust to provide for the Lawrence Schools Foundation upon my death; I've listed the Lawrence Schools Foundation as the beneficiary of my IRA account; etc.) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

My best estimate of the current value of this gift is \$ \_\_\_\_\_

I/We want this gift to be used for \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Please provide a copy of the documentation that directs your estate gift to the Lawrence Schools Foundation.

It is understood that this form is for our records only. It is not legally binding upon you or your estate as to the ultimate receipt or value of any future gift.

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

**Thank you for your support of the Lawrence Schools Foundation**