

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 Archmere Academy in your will or trust please use the following suggested language:

Residual Bequest — A residual bequest comes to us after your estate expenses and specific bequests are paid.

I give and devise to Archmere Trust (Tax ID #46-1515121), located in Claymont, DE, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

Specific Bequest — Naming Archmere as a beneficiary of a specific amount from your estate is easy.

I give and devise to Archmere Trust (Tax ID #46-1515121), located in Claymont, DE, the sum of \$ _____ (or asset) to be used for its general support (or for the support of a specific fund or program).

Contingent Bequest — Archmere 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 Archmere Trust (Tax ID #46-1515121), located in Claymont, DE, 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:

For Gifts to the Archmere (Annual) Fund:

Broker Contact: Penny Cavelli, Morgan Stanley
302-657-2062

DTC #: 0015

Account name: Archmere Academy

Account #: 532-029028-202

For Gifts to Endowment, Scholarship, or Capital Funds:

Broker Contact: Dennis Valentino, Wells Fargo
302-256-0501

DTC #: 0141

Account name: The Archmere Fund

Account #: 8436-6080

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 a copy to Katherine Ball-Weir.

Legal Name: Archmere Trust

Tax I.D. Number: 46-1515121

Incorporated In: Claymont, DE

Note to Attorneys, Accountants and other professional Advisors:

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please call Katherine Ball-Weir at 302-798-6632 x857.