



GEORGETOWN PREPARATORY SCHOOL

10900 ROCKVILLE PIKE | NORTH BETHESDA, MARYLAND 20852 | WWW.GPREP.ORG

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 Georgetown Preparatory School in your will or trust please use the following suggested language:

"I, [name], of [city, state, ZIP], give, devise and bequeath to Georgetown Preparatory School [written amount or percentage of the estate or description of property] for its unrestricted use and purpose."

GIFTS OF APPRECIATED SECURITIES:

Please contact Georgetown Preparatory School for a stock transfer form.

BENEFICIARY GIFTS FROM RETIREMENT PLANS, LIFE INSURANCE, BROKERAGE ACCOUNTS OR ALL 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 Georgetown Preparatory School.

Legal name: Georgetown Preparatory School
Federal Tax ID number: 52-0591606
Incorporated in: North Bethesda, MD

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 Georgetown Preparatory School, at 301.493.5000.