

How to Leave a Bequest

Making a bequest is the most common way to provide for an estate gift to **PRESIDIO HILL SCHOOL**. A bequest is a provision in a will or living trust that directs funds or assets to the school. It is simple to include **PRESIDIO HILL SCHOOL** as a beneficiary when estate planning documents are prepared or to add a codicil or amendment to the provisions of existing documents.

There are various types of bequests:



Specific bequest: The school receives a specific dollar amount or property as designated.

Residual bequest: After all debts, expenses, and specific bequests have been paid, the school receives the remainder of the estate or a percentage of the remainder.

Contingent bequest: The school becomes a beneficiary if certain conditions are met; a typical condition is that certain relatives or friends must have predeceased the donor in order for the school to benefit from the estate.

Bequests can be made with gifts of cash, appreciated securities, or real estate.

Bequest gifts will be unrestricted unless otherwise designated to the following programmatic areas within the school:

Tuition Assistance: This fund enables PRESIDIO HILL SCHOOL to remain as diverse as our communities in the Bay Area by offering tuition assistance to a range of families.

Education and Programming: Gifts directed to this fund supports books and materials for the classroom and library.

Professional Development for Faculty: Gifts directed to this fund allows our faculty to participate in trainings and conferences designed to maintain an exceptional, caring, classroom environment for our students.

For more information please contact Lynda Sanjurjo-Rutter, Director of Development, at 415.751.9318 x106 or Lynda_Sanjurjo-Rutter@presidiohill.org

Presidio Hill School's Tax I.D. Number is 94-1201211

This document provides general information about giving opportunities at **PRESIDIO HILL SCHOOL** and is not intended to offer legal or tax advice. Please consult an attorney or financial advisor for all matters related to estate planning—including the specific wording of bequests in your will.