



Lives of Consequence

THE CAMPAIGN FOR
ST. MARK'S SCHOOL

Understanding Planned Gifts and Their Benefits



Planned giving lets you integrate your personal, financial, and estate planning by making lifetime or testamentary charitable gifts. Below are some common types of planned gifts and their benefits.

Bequest

A bequest is a gift made through your will or trust. It is the simplest type of planned gift to make and one of the easiest to implement.

Benefits

You want to create a legacy at St. Mark's but need your property to cover living expenses or health care costs. A bequest allows you to leave remaining resources to St. Mark's.

Charitable Gift Annuity (CGA)

You make a gift of cash or property to St. Mark's and we agree to make fixed payments for one or two lives.

Benefits

You receive fixed income for the future. This plan works well with your gift of cash or appreciated stock that is providing little or no income.

Charitable Remainder Trust (CRT)

You transfer cash or property to fund a trust that makes payments for your lifetime or a number of years, and then passes what remains to St. Mark's.

Benefits

You own appreciated property that produces little or no income and would like to sell without paying capital gains tax. You may be desiring income for retirement.

Beneficiary of IRA or Retirement Plan

You designate St. Mark's as a full or partial beneficiary of your retirement plans, IRAs, or pension accounts.

Benefits

You can avoid having sums subject to income and estate taxes by passing it on to St. Mark's

Become an Androcles Society member today. For more information, contact:

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