

FIRST BAPTIST SCHOOL of CHARLESTON

ACADEMIC
EXCELLENCE



CHRISTIAN
PERSPECTIVE

Confidential- Will and Estate Survey

From: Name _____
Address _____
City _____ State _____ Zip _____
Telephone _____ Email: _____

- ☐ I am pleased to inform you that I have included a bequest to the endowment trust fund for the First Baptist School Endowment (FBS) in my will.
- ☐ I am pleased to inform you that it is my intention to include a bequest to the trust fund for the First Baptist School Endowment in my will.

Gift Description:

___ Outright gift of cash or securities ___ Charitable trust
___ Gift of life insurance ___ Charitable gift annuity
Gift of personal property: _____
Gift of real estate: _____

- ☐ While I have not planned a gift to the trust fund of First Baptist School, I would appreciate information on the items indicated above.
- ☐ I would appreciate a visit from a qualified First Baptist School representative to discuss estate planning.

In telling you of my plans, I do not intend to create any legal obligation on the part of myself or my estate to the First Baptist School. Comments related to the above:

Date _____ Signature _____

***Memo to my Lawyer** First Baptist School has a permanent trust fund that I would like to consider for a bequest the next time we have occasion to consider my will. Please put this memo in my will folder as a reminder to us.

**** If you intend to make a bequest at your next will review, photocopy this form and send to your attorney. Please return completed form to First Baptist School, 48 Meeting St., Charleston SC 29401**