



SUGGESTED LANGUAGE FOR TESTAMENTARY GIFT TO PUNAHOU SCHOOL

The language in your will or revocable living trust providing for a gift to Punahou School should reflect your own unique circumstances and charitable objectives. We hope these samples will be helpful to you and your attorney.

UNRESTRICTED GIFT:

"I give to Punahou School, Honolulu, Hawaii, [the sum of \$_____] or [____]percentage (or all) of the residue of my estate] to provide unrestricted (endowed/non-endowed) support for the school."

GIFT FOR A SPECIFIC PURPOSE:

"I give to Punahou School, Honolulu, Hawaii, [the sum of \$_____] or [____]percentage (or all) of the residue of my estate] to provide support for _____
(e.g., financial aid, faculty support, _____ program, etc.) at Punahou School."

ENDOWED SUPPORT FOR A SPECIFIC PURPOSE:

"I give to Punahou School, Honolulu, Hawaii, [the sum of \$_____] or [____]percentage (or all) of the residue of my estate] to provide endowed support to be used in perpetuity in a manner consistent with my written instruction or gift agreement on file with Punahou School."

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GIFT FROM INVESTMENT ACCOUNTS, RETIREMENT ACCOUNTS, OR LIFE INSURANCE POLICIES

If you wish to direct a retirement plan asset, brokerage accounts, or life insurance policies to Punahou, simply list **PUNAHOU SCHOOL** (Tax ID number 99-0073523) on your beneficiary designation form, which can be easily requested from your plan administrator or life insurance agent. A specific purpose at Punahou can be designated on the form or through a letter that we can keep on file here at the Office of Gift Planning.

The focus of Gift Planning at Punahou is to provide information about various gift plans so that you and your advisors can then determine, based on your philanthropic, financial, and estate planning goals, the greatest benefits to you. For additional information or assistance, please contact Carrie Ogami, J.D. at (808) 944-5845 or giftplanning@punahou.edu.