

THE HOLDEN CIRCLE

Confidential Membership Form



Welcome to the Holden Circle, a membership that recognizes all those who have included Colorado Rocky Mountain School in their estate plans through a bequest provision in their will of trust, a life-income gift or other deferred gift.

Today's Date _____

Name (s) _____

Date of Birth ____ / ____ / ____

Name (s) _____

Date of Birth ____ / ____ / ____

Phone _____ Email Address _____

A. HOLDEN CIRCLE MEMBERSHIP LISTING

- I/we prefer my/our name(s) to be listed as: _____
- I/we prefer to remain anonymous

Holden Circle members are listed in Colorado Rocky Mountain School's publications, on our website, and may be listed on future public recognition displays. The type and amount of the gift to CRMS will remain confidential until the gift is realized.

B. MY/OUR FUTURE GIFT

Type of Gift	Estimated Value	Comments
_____	_____	_____
_____	_____	_____
_____	_____	_____

Types of Gifts: Bequest (please list specific amount or percentage); Life Insurance Policy (please list death benefit amount, and whether CRMS is primary or secondary beneficiary); Qualified Retirement Plan (IRA, 401k, 403b) (please list CRMS interest % and whether CRMS is primary or secondary beneficiary); Charitable Remainder Unitrust or Annuity Trust, Testamentary Charitable Lead Trust (please list CRMS interest %).

CRMS will direct all Planned Gifts according to our Gift Acceptance Policy. If you would like to learn more about our policy or to discuss a restricted gift, please contact our Development Office.

C. DOCUMENTATION

- Yes, I/we will share a copy of the portion of the will that applies to Colorado Rocky Mountain School, or the trust agreement or Change of Beneficiary Form (401k, 403b, IRAs, Insurance) in which Colorado Rocky Mountain School is named.