



Advisor's Guide for Planned Giving

Gifts from Wills and Trusts

Sample Bequest Language

To name Regis High School in a will or trust, please use the following suggested language:

I hereby give, devise, and bequeath (_____ dollars) or (a specific asset, such as securities, real estate, or other property) or (__ percent of the rest, residue, and remainder of my estate) to Regis High School, a nonprofit organization located at 55 East 84th Street, New York, NY, 10028, Federal Tax ID # 13-1624155, for Regis High School's general use and purpose.

Gifts of Appreciated Securities

EIN: # 13-1624155

Portfolio Managers: Fidelity Investments

DTC#: 0226

Further credit to account#: 677-029327

Account Name: Regis High School

Contact: Kevin Bannon, Regis High School

Telephone: 646-657-2006

Please notify the Office of Advancement at giving@regis.org with the type and amount of shares gifted and the expected date of transfer so that we may properly credit your client's gift.

Beneficiary Gifts from Retirement Plans, Life Insurance, or any plan with a beneficiary designation

Please contact your plan provider for a change of beneficiary form from the plan administrator to list Regis High School as beneficiary at the following address:

Regis High School
55 E. 84th Street
New York, NY 10028
EIN: # 13-1624155

Note to Professional Advisors

Thank you for working with the Office of Advancement to help your client achieve their philanthropic goals and support our mission for the next generation of students. We are grateful for your time and expertise. If you have any questions, The Office of Advancement at Regis High School is available to discuss planned giving options with you and your client. Please contact us directly at giving@regis.org or call 212-288-1142.