Planned and Legacy Giving with BES

Your Values. Your Impact. Your Legacy.

build. excel. sustain.

Strong schools rest on the shoulders of strong leaders. Planned and legacy gifts ensure that BES can continue identifying, training, and supporting excellent leaders who transform education for generations to come. These giving options allow you to make a lasting impact while offering flexibility and potential tax benefits that align with your personal goals.

To learn more about BES's leadership programs and recent impact, please visit **bes.org** or explore our latest **Annual Report**.

BEQUESTS AND BENEFICIARY DESIGNATIONS

Include BES in your will or trust, or name BES as a beneficiary of your retirement plan, IRA, or life insurance policy. You can designate a specific amount, a percentage, or the remainder of your estate, allowing you to create a meaningful legacy that reflects your lifelong commitment to educational excellence.

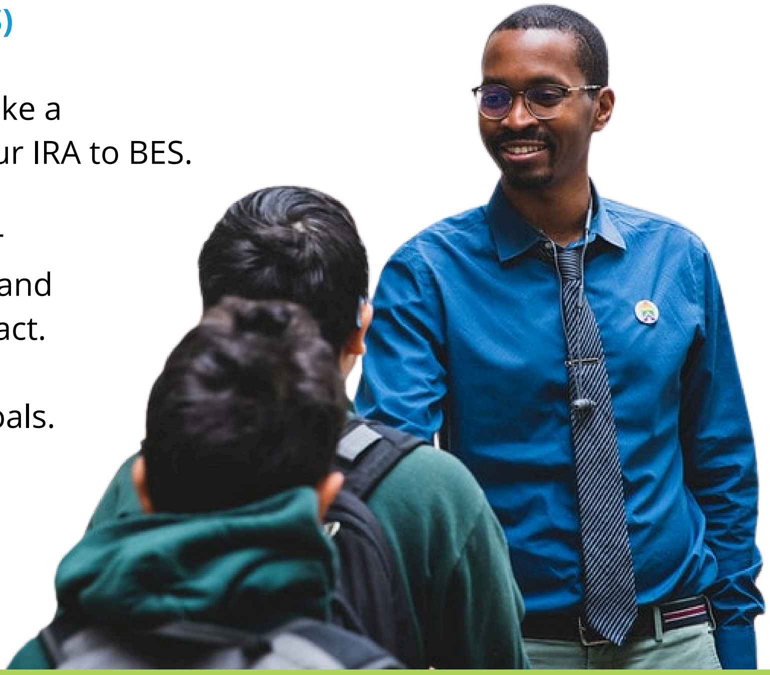
GIFTS OF STOCK OR APPRECIATED ASSETS

Donate appreciated securities, mutual funds, or other assets to support BES's mission in a meaningful way. This type of gift may offer financial advantages and is a thoughtful way to strengthen our mission while making use of assets that have grown over time.

QUALIFIED CHARITABLE DISTRIBUTIONS (QCDS)

If you are 70½ or older, you may be eligible to make a Qualified Charitable Distribution directly from your IRA to BES.

Donating appreciated securities, mutual funds, or other assets may provide certain tax advantages and can be an effective way to make a significant impact. This thoughtful form of giving helps advance BES's mission while aligning with your financial goals.



CHARITABLE GIFT ANNUITIES AND TRUSTS

Create a gift that supports BES in the future while providing income for you or loved ones now. A Charitable Gift Annuity offers steady, fixed payments for life, with the remaining amount benefiting BES. Charitable Trusts offer flexible ways to provide income over time and make a meaningful future gift to BES.

ENDOWMENT AND LONG-TERM GIFTS

You can establish or contribute to a BES endowment or long-term fund, ensuring that your values and vision continue to shape the next generation of school leaders.

How to Get Started

Speak with your financial or legal advisor about the option that best fits your goals. Use our legal information when completing your plans:

- Legal Name: BES
- EIN: 35-219415
- Address: 131 Dartmouth Street, Floor 3, Boston, MA 02116-5297

If you decide to include BES in your estate plans, we would be grateful if you would complete our **Legacy Gift Intention Form**. This helps us thank you appropriately and ensure your wishes are honored.

CONTACT

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Important note: BES does not provide legal or tax advice. Please consult your financial, legal, or tax advisor to understand how these giving options may apply to your personal circumstances.