

# Welcome Advisors, Attorneys, Accountants



Thank you for helping your client make a meaningful planned gift to The John Crosland School. We value your expertise and are here to assist in any way. This Advisor area is for professionals like you who see the valuable client relationship-building benefits of including charitable planning in their practice.

The John Crosland School  
Jennifer R. Nichols  
Director of Institutional Advancement  
704-749-6712  
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5146 Parkway Plaza Blvd.  
Charlotte, NC 28217

## Brokerage/Tax Information

Merrill Lynch Contact: Dan Sexton  
Contact # 704-337-2914  
DTC# 5198  
The John Crosland School Acct #571-02431  
Tax ID # 56-1211583

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## Sample Bequest Language for a will or trust:

### RESIDUAL BEQUEST LANGUAGE

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to The John Crosland School (Tax ID #56-1211583), located in Charlotte, North Carolina, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

### SPECIFIC BEQUEST LANGUAGE

Naming The John Crosland School as a beneficiary of a specific amount from your estate is easy:

I give and devise to The John Crosland School (Tax ID #56-1211583), located in Charlotte, NC, the sum of \$\_\_\_\_\_ (or asset) to be used for its general support (or for the support of a specific fund or program).

### FOR OTHER TYPES OF BEQUEST LANGUAGE PLEASE CONTACT:

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