



Bernardsville Library Foundation

Confidential Pledge Form

I/We pledge a gift of \$ _____.
This total pledge will be paid over ____ year(s).
The pledge will be paid in (annual/semi-annual/quarterly/monthly) _____ installments.
The first payment will be made on _____ (month/year).

I/We have enclosed a 10% deposit of \$ _____ (optional).

Payments will be made by:

Check **Securities Transfer** **Checking Account Payment Deduction**

Name and address of bank _____

Account Number _____ 9-Digit Routing Number _____

Credit Card: VISA or MASTER CARD (please circle)

Name on Card _____

Card Number _____ Expiration Date _____

CSV Code on Back of Card _____

Other Asset Transfer (describe) _____

I/We understand that a portion of the Bernardsville Library Foundation Endowment Fund principal is not permanently restricted and could be withdrawn for library use in extraordinary circumstances.

Alternatively, by checking the following box, I am/we are indicating that I/we want my/our gift to be permanently restricted.

Planned Gift as follows (see reverse for suggestions) _____

I/We qualify for a Matching Gift (please attach matching gift form or instructions).

The gift is in memory/honor of: _____

Donor Name(s): _____

Address: _____

Telephone: _____ Email Address(es): _____

Signature(s): _____ Date: _____

Thank You!

PLANNED GIVING:

If you choose to make the Bernardsville Library Foundation Endowment Fund a part of your estate plan, there are many ways to do so:

- Include a provision in your will or trust naming the Endowment Fund to receive a specific sum of money or a percentage of your residuary estate after all other beneficiaries have been named.
- Name the Endowment Fund as the beneficiary of part of your IRA, 401 (k), 403 (b) or other tax-sheltered retirement plan.
- Name the Endowment Fund as a beneficiary of your life insurance policy.
- Leave specific property to the Endowment Fund, such as a piece of real estate or a work of art.

We suggest that you share this sample unrestricted bequest language with your attorney:

I give ____% of my residuary estate *or* the sum of _____ dollars to the Bernardsville Library Foundation Endowment Fund, 1 Anderson Hill Road, Bernardsville, NJ 07924, for its general purposes as an unrestricted gift.