



# DELPHI SOCIETY

## Membership Recognition

The Delphi Society is a group of special friends of the Shelton School who help ensure the long-term well-being of the School by including Shelton in their long-term financial or estate planning. The Delphi Society offers Shelton School the opportunity to express gratitude to members, and by providing special recognition, to encourage others to become members. *We understand that as circumstances change, you may alter your plans to meet your needs and those of your family.*

I / We hereby acknowledge membership in the Delphi Society of Shelton School, affirming that Shelton School is included in my/our long-term estate or financial plans:

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

\_\_\_\_\_ Shelton School may include my / our names, as listed above, on public membership notices.

\_\_\_\_\_ Please record my / our membership as "anonymous."

Signature(s): \_\_\_\_\_

### The following information will help us plan for the future:

I / We are pleased to acknowledge that I / we have named Shelton School as a beneficiary of:

- |  |  |
|--|--|
| <input type="checkbox"/> Will / Living Trust   | <input type="checkbox"/> Charitable Remainder Trust          |
| <input type="checkbox"/> Retirement Plan       | <input type="checkbox"/> Charitable Gift Annuity             |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Payable / Transfer on Death Account |
| <input type="checkbox"/> Donor Advised Fund    | <input type="checkbox"/> Other _____                         |

My / our gift is:

- Unrestricted  
 Designated specifically for: \_\_\_\_\_  
 Not yet determined. Please contact me to discuss options.

Optional but helpful information:

The estimated present value of my/ our gift is: \_\_\_\_\_

Copies of relevant documents are attached: Yes / No

Please fill out this form and email to [tbruno@shelton.org](mailto:tbruno@shelton.org)