



Confidential Letter of Intent

Thank you for notifying us of your planned gift to the American Montessori Society. Your commitment is a powerful way to create a lasting legacy while supporting AMS's mission and ensuring flexibility to meet your personal and family goals. In recognition of individuals who make long-term provisions to advance Montessori education, AMS is proud to welcome planned giving donors as members of the AMS 1870 Society.

All information provided will be kept confidential, used solely for the internal purposes of the American Montessori Society, and does not constitute a legal or financial obligation.

Donor Information

Donor Name (Print): _____

Donor Signature: _____ Date Signed: _____

Donor Name (Print): _____

Donor Signature: _____ Date Signed: _____

Address Line 1: _____ City: _____

Address Line 2: _____ State: _____ Zip Code: _____

Email Address: _____ Phone Number: _____

- ☐ My / our name(s) may be published as member(s) of the AMS 1870 Society.
- ☐ I / we prefer to remain anonymous.

Gift Intent Information

Completion of this section is encouraged but optional.

As an expression of my / our commitment to the American Montessori Society, I / we have made a planned gift provision to AMS as follows:

Select all that apply:

- ☐ Bequest in my / our Will
- ☐ Provision in my / our Revocable Living Trust
- ☐ Establishment of a Charitable Gift Annuity
- ☐ Beneficiary Designation in my / our Qualified Retirement Plan or Commercial Annuity

- ☐ Life Insurance Gift
- ☐ Endowment Fund
- ☐ Other

I / we worked with the following advisor to establish the gift:

Advisor Name: _____ Title/Profession: _____

Company Name: _____

Company Address: _____

City: _____ State: _____ Zip Code: _____

Once completed, please email this form to mshivji@amshq.org, or mail to:

American Montessori Society
211 E 43rd St
7th Floor, #262
New York, NY 10017

To better understand your intentions and to ensure your wishes are honored, a member of our team may follow up to schedule a conversation at your convenience.

Thank you for your foresight and generosity in creating a meaningful legacy that will support the future of the American Montessori Society.