

Continuing a Legacy

“I still remember our first visit to Bertschi School,” recalls Helen Graham. “Good friends had raved about it, and when we toured, I understood why. Michael and I were so impressed with the confidence, articulateness and poise of our 5th grade tour guide—we thought if our child could turn out like this, it was a great place!”

Helen’s son Jesse graduated from Bertschi in 2010 and is now a 7th grader at Lakeside. In Helen’s words, “Jesse received an incredible education. He was challenged, supported, encouraged and most important to me, very well loved. Jesse learned invaluable lessons about respect, inclusion, teamwork and building community which have stayed with him to this day. I have Bertschi School to thank for that and much more. He formed deep friendships as did we, which continue to this day.”

It is a small way of saying thank you and of continuing the tradition of generosity that we were grateful to be a part of.

~Helen Graham



When Jesse was in second grade grade, his father Michael was diagnosed with a terminal illness. Helen shares thoughtfully, “Our connection at Bertschi was something that helped sustain us through a very dark and despairing time. We got to experience first-hand the support, inclusion, steadfastness and dedication of the Bertschi community and how we were held by it in a profound and life-changing way. Such generosity! Food, childcare, trips to the hospital, gifts—mostly just continuous, thoughtful attention and care from so many wonderful people.”

“Given our experience, it is very easy to think about making a planned gift to the school,” says Helen. “It is a small way of saying thank you and of continuing the tradition of generosity that we were grateful to be a part of. The gift will be designated for financial aid to support the diversity of the school, which is something we value very much. I encourage all members of the Bertschi community to consider making a planned gift—to think about how much the school has meant to your child’s education and to the friendships you have made which make your life so much richer. It is truly just a small way of saying thank you, and continuing the school’s wonderful legacy of caring.”

Bertschi is grateful to Helen for her intention to honor and support the school through a planned gift. **The Bertschi Legacy Circle** was established to honor generous alumni, parents, and friends like Helen, who have created trusts, bequests, or other planned gifts to benefit

the school. All who provide for the future financial security of Bertschi School with planned gifts are eligible to become members of the Bertschi Legacy Circle. For more information or to advise the school of your intention, please contact Tiffany Carey, Director of Advancement.

What Is Planned Giving?

Planned giving (sometimes called “gift planning”) can enable donors to make larger gifts than they could make from their income. Some planned gifts provide life-long income to the individual or family, while others use estate and tax planning strategies to benefit both the school and the donor. A planned gift can maximize the contribution to the school and/or minimize its impact on the individual’s estate.

Planned gifts differ from contributions to the annual fund, which usually are funded by discretionary income; annual donations are not strategically planned with an eye toward one’s overall financial worth.

Why Make a Planned Gift?

- Donors can contribute appreciated property, like securities or real estate, receive a charitable deduction for the full market value of the asset, and pay no capital gains tax on the transfer.
- Donors who establish a life-income gift receive a tax deduction for the full, fair market value of the assets contributed, minus the present value of the income interest retained; if they fund their gift with appreciated property they pay no upfront capital gains tax on the transfer.
- Gifts payable to the school upon the donor’s death, like a bequest or a beneficiary designation in a life insurance policy or retirement account, are exempt from estate tax.

The Most Common Planned Gift – A Bequest

A bequest through a will, which specifies how a donor’s property will be distributed after his or her death, is the most common type of planned gift. A bequest can indicate a specific dollar amount or asset (such as tangible property), or it can assign a certain percentage of the donor’s estate to the school. Schools are often informed of a donor’s intention to name the institution in their estate plans many years in advance of receiving the gift. It is often helpful and advisable for an individual considering a planned gift to consult with the school, particularly with regard to the intended use of the funds. Bequests designated for general purposes give the school greatest flexibility and reduce the likelihood that a donor’s wishes might not align with the school’s priorities. Bequests are critical to growing a school’s endowment, which provides recurring annual revenue and thus great financial stability during times of economic uncertainty.

Donors should consult with their tax advisor regarding current charitable giving regulations and tax benefits applicable to their financial situation.