

Going Beyond... with a Planned Gift

You can create a legacy of innovation and connection for generations to come with a planned gift to Tampa Preparatory School.

Gifts like these are tremendously important for the School's long term success. They can also be created, changed and refined by donors at any age and giving level. In fact, planned gifts often allow donors to give more over time to the organizations and causes they care about.

A gift from your estate or through another planned giving vehicle can enhance an existing program or project or support the overall work of Tampa Prep as we "inspire next" in our community and prepare young people for the world of tomorrow. Donors who have remembered the School in this way are recognized as members of our Terrapin Legacy Society.

Options for creating your charitable legacy include:

- **A bequest in your will or trust** – designate a specific amount, a percentage or what remains of your estate to Tampa Preparatory School after providing for your loved ones and meeting other commitments.
- **Retirement plans** – name Tampa Prep as a beneficiary of your IRA, 401k or 403b retirement plan, which can minimize tax implications for your heirs.
- **Life insurance** – make the School a beneficiary of your life insurance policy or gift the policy outright.
- **Donor Advised Funds** – name Tampa Prep a beneficiary/successor or designate a portion of the account value for the School upon final distribution, while preserving the remainder for your family to continue your legacy of philanthropy.

These are just a few of the most common ways to leave a legacy that reflects your life, values and philanthropic goals. Thank you for considering Tampa Prep as a partner in that endeavor. Please consult your personal legal and tax advisors for guidance on these or more complex arrangements that might suit your objectives.

While you are in no way obligated to do so, we hope you will let us know if you have included Tampa Prep in your estate or other legacy plans. Providing us with notice of your intention is the best way to ensure that we receive the gift you have planned and that we clearly understand how to honor your wishes. It also gives us an opportunity to celebrate your generosity, which may inspire others to consider their own legacies.

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