

Nano Nagle Legacy Society

The ***Nano Nagle Legacy Society*** was formed to recognize and honor those donors who have remembered Presentation High School in their estate planning. Through this act of generosity, you have the special satisfaction of knowing that you are making an investment in the future of the young ladies attending our school. We hope you will consider how, by making Presentation a beneficiary in your estate plan, you can help perpetuate our distinguished academic tradition. In addition, severe tax implications may be avoided by making provisions now in your estate plan for your charitable gifts.

Following are some ways to remember PHS while significantly reducing the estate taxes you might pay to the government. As always, please consult with your attorney, accountant and/or estate planner for financial advice. If you have remembered PHS in your estate plan please notify the Development Office at 408-264-5110.

Bequest

You can remember PHS by making a provision in your Will or Trust. A bequest is one of the ways to remember those you care about most.

Wealth Replacement Trust

Perhaps you would like to make a sizable contribution to Presentation now to help meet our current needs, but you do not want to reduce the estate you will pass to your family. The solution? Purchase life insurance.

Charitable Remainder Trust

What are your plans for the future? While there is no single way to achieve all of your personal and financial goals, there is one strategy that can meet many of your needs. It is called a charitable remainder trust. In the right circumstances, this plan can increase your income, reduce your taxes, unlock appreciated investments, rid you of investment worries and ultimately provide very important support.

Charitable Lead Trust

If your goal is to provide an inheritance for your children, but you would also like to make a significant current charitable gift, find out how a charitable lead trust can help you satisfy both objectives. It is a charitable lead trust that can provide current income to Presentation, an immediate tax deduction, and a reduction in the cost of passing property to your heirs.