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● A Flexible Way to Support What You Love



Menlo School

A LIFE-CHANGING EXPERIENCE

Alumnus Gives Back to Help Future Generations

What transpired on a bright, early day in June 1952 is more than just a fond memory for Don Scott '52; that day represents the culmination of some of the most formative and memorable years of his life.

During high school at Menlo School for Boys (as it was then known), Don and his brother Robert, both boarders, and their classmates, who hailed from all over the West Coast, lived an entirely different life than today's Menlo students, save for one thing: the exceptional education.

"I've had so much amusement and many comforts recalling those years,"

Don says. "At Menlo we learned the discipline of study, how friendships were made, what altruism can achieve, how transitory every honor in sport and study is, and how fragile our life is beyond the confines of parental security and the bonds of friendship. We learned to grow up." Needless to say, Don's Menlo experience is near and dear to his heart.

Don went on to pursue a major in French and a minor in anthropology at Stanford University. After spending a year in New York City working in American Express' Travel Department, he returned to San Francisco and worked for P&O

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Don Scott '52 wanted to show his appreciation for Menlo and give future students the same opportunities.

"I think the AESF is the best way to honor Menlo, and the student given a scholarship is the honor achieved."

—Don Scott '52

MENLO IS 100! See page 4 to learn how you can celebrate with us.



CREATE A LASTING LEGACY

These days, we hear a lot about visionaries: people who have had the foresight to imagine the future as they want it to be and do something—just one significant thing—to set off a chain of events that makes that envisioned future come true.

YOU CAN BE THAT VISIONARY.

YOUR ENDOWED GIFT TO MENLO SCHOOL

→ The gift opens a mind

→ The opened mind promises unbounded possibility

→ Unbounded possibility changes a life

A CHANGED LIFE IMPROVES THE FUTURE

An endowment is a forever gift—a fund you establish in which the principal is invested and all or part of the earnings are used to help the programs and goals you want to support. Because the principal isn't spent, endowments last forever.

HOW AN ENDOWMENT WORKS

Endowed funds can be established at Menlo with a minimum of \$100,000. You can give cash, securities, or other assets to create this fund.

If you are unable to give assets today to create a new endowed fund, consider making this type of gift in your will

or other estate plans, or with gifts of retirement plan assets or life insurance benefits. We recommend that you specify a minimum amount in your will or living trust and include a provision directing your executor to distribute more funds if needed to meet future requirements, should they change.

You can specify the purpose of the fund, such as faculty support or scholarships, or leave it unrestricted so that Menlo can use the income on the fund to support the School's highest priorities. Once we receive your gift, we will use the endowment income as specified in the terms of the fund. The balance of your endowment fund will remain invested to ensure it benefits Menlo in perpetuity.

ARE YOU READY TO MAKE AN ENDOWMENT GIFT?

An endowment gift to Menlo may be the right choice for you if you want to support Menlo after your lifetime, honor your family name or someone special to you, or provide for a program far into the future. Contact Vidya Kagan, Director of Development, at 650.330.2044 or vidya.kagan@menloschool.org for more information.

THE GIFT THAT KEEPS ON GIVING

Learn more about creating endowments in our FREE guide *Create a Lasting Tribute for Someone You Love or Admire*. Simply return the enclosed survey to receive your copy today.





BECOME A MEMBER OF MENLO'S LEGACY SOCIETY

Have you named Menlo in your will or trust, or otherwise included us in your estate plans? If so, thank you! We are pleased to welcome you as a member of our **Legacy Society**. The **Legacy Society** honors those who provide support for Menlo School through bequests in wills or trusts, life income gifts, retirement plans, life insurance designations, and other vehicles.

To thank you for your support, **Legacy Society** members are recognized in our annual report (unless you choose to remain anonymous) and invited to special events.

Please let us know if you've included Menlo in your estate plans. Your thoughtful planning will help ensure that a Menlo education is available for future generations.

THANK YOU!

A LIFE-CHANGING EXPERIENCE

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Cruise Lines, researched French history, and ended his career with a historic maritime shipping agency that allowed him to travel to Japan. He now resides in Lincoln, CA, where he spends most of his time reading and listening to classical music.

Fond Memories Lead to Generous Gift

During Don's most recent visit to Menlo, he was impressed by the students and their achievements. Despite significant physical changes in the campus, Don immediately recognized that "the alumni of both past and future can respect and hold great affection for what has been accomplished" at Menlo.

Due to his fond memories of his time at Menlo and his desire to provide for other students, Don decided to give a gift of real estate, through his will, to Menlo. His gift will support Menlo's Alumni Endowed Scholarship Fund (AESF), which helps to build the School's endowment while supporting financial aid, promoting economic diversity, and allowing talented students with financial need to have access to a life-changing Menlo education.

Don is making his gift to help other students "have the same educational experience" and "expand their knowledge" with everything that Menlo has to offer.

"I think the AESF is the best way to honor Menlo and the student given a scholarship is the honor achieved," Don says. "I want the student to reflect the Menlo education, which is academic, social, artistic, and athletic, and gift his or her achievements in the School to his society."





MEET MENLO

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WE'RE HERE TO HELP.

If you have questions about anything in this newsletter or about ways to give to Menlo, please contact us at any time or visit our new planned giving webpage: www.menloschool.org/support-Menlo/planned-giving.

THANK YOU!

Large or small, your gift makes an impact on Menlo students.



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A FLEXIBLE WAY TO SUPPORT WHAT YOU LOVE

A Gift You Plan Now and Make Later

Giving to Menlo through your will or living trust has many advantages. You can retain control of your assets during your lifetime and possibly reduce your estate taxes, while at the same time sustain and strengthen Menlo for years to come.

Consider the following:

- **IT'S EASY.** A few sentences in your will or living trust complete the gift.
- **IT'S VERSATILE.** You can give a specific amount of money, a percentage of your estate, or a specific item in your estate.
- **IT'S TAX-WISE.** Your estate is entitled to an unlimited estate tax charitable deduction for gifts to qualified charitable organizations.

To leave your legacy at Menlo, please include the following information in your will or other estate planning documents today!

"I, [name], of [city, state, zip], give, devise, and bequeath [written amount or percentage of estate] to Menlo School (tax ID #94-3204137), located at 50 Valparaiso Avenue, Atherton, California, 94027, for its unrestricted use and purpose."

WHAT DOES IT MEAN TO BE 100?

A school, just like its students, grows and changes over the course of its life. From Menlo's start as a boys' military school to turning co-ed in 1979 to the twists and turns of the late 20th century, Menlo offers an innovative, relevant education for students joining the 21st century world. Celebrate with us throughout 2015 to relive the past, marvel at the present, and dream for the future!

VISIT WWW.MENLOSCHOOL.ORG/100 to keep up to date on Centennial events. We hope to see you on campus soon!

