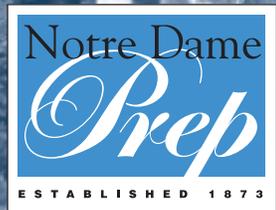


The Gateway



A Charitable Planning Guide for Alumnae and Friends of Notre Dame Preparatory School • Spring 2018

SHEILA MCHENRY'S GIFT IMPACTS OUR GIRLS INTO THE FUTURE

Several years ago, after learning about alternative ways to give, Sheila McHenry '62 and her husband Bill designated Notre Dame Preparatory School (NDP) as a beneficiary of a life insurance policy. As the parents of four children and the grandparents of 14, they wanted to give back to NDP in a way that did not require a large cash gift and would not compromise their ability to help their family.

Sheila and Bill's gift will one day fund the Catherine Joan McDonnell Scholarship Fund, named in memory of Sheila's mother and designed to benefit middle-income students who otherwise would be unable to afford an NDP education.

Looking back fondly on her 12 years at NDP, Sheila wanted other young women to have the same NDP experience she has valued throughout her life. She appreciates not only the academic and moral foundation she received but also the way she was encouraged to express her opinions with confidence. The lessons she learned about teamwork through Gym Meet, and the way students lived the mission through service work, have stayed with her. She also developed lifelong friendships.

While appreciating NDP's new programs and opportunities, Sheila knows the mission has remained constant. "I still remember Sister Helen Marie telling us 'to act justly, to love tenderly, and to walk humbly with God,'" she says. "Although



Pictured are Sheila and Bill McHenry and their family during a Christmas holiday.

it is not always easy to follow these words, they have stuck with me for my entire life."

Thanks to Sheila's love of her alma mater and generous planned gift, future generations of young women will have the opportunity to attend NDP, where they will learn—and learn to live—the words of the prophet Micah, words that continue to echo throughout our halls on Hampton Lane.



Like Sheila and Bill, you can also impact our students in the future. To learn more, please contact Kristen Kinkopf at 410.583.8797 or kinkopf@notredameprep.com.



Students from the middle level tie prayer ribbons to a tree branch for a prayer service.

CHANGE A LIFE IN JUST 5 MINUTES

In less time than it takes to brew a pot of coffee, you can make a lasting impact at Notre Dame Prep.

Here's How:

One of the easiest gifts you can make is to name NDP as a beneficiary of one of your assets, such as your retirement plan or life insurance policy. This is a popular gift to give because you can set it up by yourself. There's no need to use the services of an attorney or financial advisor to put your gift in place.

Simple Steps to Follow:

- 1 Contact the administrator of your retirement plan, insurance policy, or bank account for a change-of-beneficiary form or simply download a form from your provider's website.

- 2 Decide what percentage of the account you wish to give to NDP and name us, along with the stated percentage, on the form.
- 3 Sign and return the form to your plan administrator or insurance company.
- 4 Be sure to let us know that you have named us as a beneficiary so we can contact your administrator at the appropriate time and put your gift to work as you intend.

Key benefit: Beneficiary designations offer built-in peace of mind. Your current budget isn't affected because you make the gift after your lifetime, and you can change your mind at any time.



FLEXIBLE WAYS TO

Give

There are many ways to make a gift to strengthen Notre Dame Prep's future that won't cost you anything today and allow you to maintain control of your assets for life. Learn more in our FREE guide **4 Simple Gifts That Deliver Big Results**. Use the enclosed reply card to request your copy today.

WRITE A LEGACY LETTER

TELL YOUR LOVED ONES YOUR STORY

The most cherished thing you leave behind when you pass away won't be a car, house, or bank account. It will likely be something much more personal, like insight into who you truly are. A legacy letter can be a touching way to pass down lessons.

Here's How:

- **Write a letter.** It's the easiest way to create a permanent record of your values and will not become outdated with changing technology.
- **Add photos to your letter.** Pictures of you, your adventures, and your relationships help tell your story.
- **Consider creating a website** or a social media post to complement the letter and provide a share-ready version for your family. Film a video testimonial to provide an added dimension and tell your story in your own voice.



Questions to Ask

In preparing your story, think about the experiences that shaped your values. The following questions can help you get started.

1. What values are most important to you? How do you follow these in your daily life?

2. What are you most grateful for personally and professionally?

3. What are the most important lessons you have learned from your loved ones, friends, or colleagues?

4. What are your hopes and dreams for the future?

5. What major events affected your view of life?

6. What advice do you want to leave your loved ones?

We would love to hear your story!

Remember to share your connection to Notre Dame Prep in your letter, and feel free to contact Kristen Kinkopf at 410.583.8797 or kinkopf@notredameprep.com if you would like to share your story with us.

TURN YOUR ANNUAL GIFT INTO A FOREVER GIFT

Annual gifts are a critical lifeline to Notre Dame Prep. Without them, we couldn't keep our tuition at a level many of our students' families can afford. Nor could we provide need-based financial aid to families who need the assistance.

If you're an annual donor, you know firsthand the satisfaction that comes from making a difference—and we deeply appreciate your generosity. But as you look to the future, you may wonder what will happen to the programs made possible through your gifts once you're gone. How can you make sure your generosity continues forever? One option is to make a gift in your will or trust to establish an endowment.

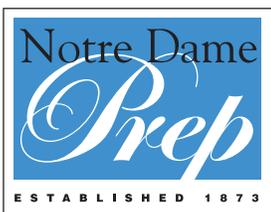
Here's an Example:

Let's say Mary makes an annual donation of \$1,000 and would like to continue her support after her lifetime. Her estate planning attorney suggests that Mary include a provision in her will to fund an endowment with a gift of \$25,000. Once funded, we will use a portion of the endowment each year to fund the program of Mary's choice. The remainder is reinvested, which allows it to grow and support annual payouts indefinitely. This generous arrangement replaces Mary's \$1,000 annual gift after her lifetime.* The benefit? NDP receives the benefit of Mary's generosity forever.

*Assuming 4 percent (\$1,000) is used by the fund annually.

Give in Their Name

You can use an endowment gift to honor someone important to you who appreciates the difference we make in young women's lives at NDP. Consider designating your endowment in his or her name as a way to celebrate the connection to NDP.



Kristen S. Kinkopf
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