

Legacy Gift Notification Form

LEGACY GIFT INFORMATION

I confirm that I have provided the following bequest gift for Pi Beta Phi Foundation, located in Town and Country, Missouri, effective _____ (date of trust/gift agreement/beneficiary form).

Gift Detail:

I am making the following gift(s) through my estate plan:

Specific Cash Bequest:

- ☐ Cash gift
- ☐ Percentage of estate gift: _____%
- ☐ Residual interest in estate gift

Specific Asset(s):

- ☐ Life Insurance policy gift
- ☐ IRA account gift
- ☐ Payable on death gift (bank account, CD)
- ☐ Percentage of Charitable Trust: _____%
- ☐ Other asset gift (please describe):

Gift Value:

My gift(s) have an actual value of \$_____.

My gift(s) have an estimated fair market value of \$_____.

At this time I choose to be recognized for:

- ☐ the full value of my legacy gift.
- ☐ a portion of the values of my legacy gift: \$_____.

DONOR INFORMATION

Donor Name(s): _____

Address: _____

City, State, Zip: _____

Date(s) of Birth: _____

Phone: _____ Email: _____

Please notify us of changes in your contact information so we can stay in touch.

Executor/Personal Representative Name: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

If possible, please provide a copy of the page(s) or section of your will, trust or beneficiary document that describes your provision for the bequest gift for Pi Beta Phi Foundation, and the title page of the bequest/trust document.

DONOR SIGNATURE

Signature: _____

Date: _____

Please Return To: Pi Beta Phi Foundation
1154 Town and Country Commons Drive
Town and Country, Missouri 63017

This statement of intent is not a legal obligation and may be changed at my discretion. Gifts to a permanent endowment are invested in perpetuity and may be merged or pooled for investment purposes with the general endowment or other assets of the Foundation and be managed and invested in accordance with Foundation policy and procedure.

Please see reverse to complete this form.

GIFT DESIGNATION

I designate my gift(s) to following fund(s):

Areas of greatest need/unrestricted:

- ☐ The Friendship Fund

Leadership:

- ☐ Chapter Leadership Education Expendable fund for:
_____ Chapter (Percentage of gift: _____%)
- ☐ Chapter Assistance Endowment Fund for:
_____ Chapter (Percentage of gift: _____%)
- ☐ The Grace Goodhue Coolidge Leadership Endowment (Percentage of gift: _____%)
- ☐ Diversity and Inclusion Leadership Fund (Percentage of gift: _____%)

Education/Scholarship: (Additional documentation is needed to establish a new scholarship.)

Undergraduate Scholarships

- ☐ General fund (Percentage of gift: _____%)
- ☐ Specific fund: _____ (Percentage of gift: _____%)

Graduate Fellowships

- ☐ General fund (Percentage of gift: _____%)
- ☐ Specific fund: _____ (Percentage of gift: _____%)

Alumnae Continuing Education Scholarships

- ☐ General fund (Percentage of gift: _____%)
- ☐ Specific fund: _____ (Percentage of gift: _____%)

Literacy:

- ☐ The Literacy Fund (Percentage of gift: _____%)
- ☐ The Elizabeth Clarke Helmick Literacy Endowment (Percentage of gift: _____%)

Housing:

- ☐ Chapter House Improvement Program fund for:
_____ Chapter (Percentage of gift: _____%)
- ☐ The Chapter Facilities Endowment (Percentage of gift: _____%)

Sisters in Need:

- ☐ Emma Harper Turner Fund (Percentage of gift: _____%)

Heritage:

- ☐ Holt House Fund (Percentage of gift: _____%)

Additional notes about my gift:

DONOR COMMITMENT

I understand I have the option of satisfying this gift intention in part or in full by making payments or other irrevocable gifts during my lifetime. I will clearly designate such payments as satisfying this gift intention in order to distinguish them from other gifts I may make during my lifetime. _____ (initial)

If unforeseen circumstances require any change in this bequest commitment, I agree to notify Pi Beta Phi Foundation of such a change and its effective date. _____ (initial)

I understand there are minimum gift levels for establishing named and/or permanently endowed funds; unless otherwise indicated by separate agreement, my gift will be restricted to the purpose I have indicated under Gift Designation and may be expended or added to an affiliated endowment at the discretion of the Board of Trustees. _____ (initial)