

ΑΣΦ

ALPHA SIGMA PHI
alphasig.org

ESTATE GIFT

I/we hereby inform Alpha Sigma Phi that I/we have made a provision for a gift for the Foundation in my/our estate plan. I/we understand that this commitment is revocable and can be modified by me/us at any time.

PERSONAL INFORMATION

Name _____ Birthdate ____ / ____ / ____
Second Name (if joint gift) _____ Birthdate ____ / ____ / ____
Mailing Address (Address, City, State, and Zip Code) _____
Primary Email Address _____ Phone _____

LETTER OF INTENT

It is my/our intent to leave a legacy to Alpha Sigma Phi through my/our:

WILL

RETIREMENT PLAN ASSETS OR IRA

LIFE INSURANCE POLICY

LIVING TRUST

CHARITABLE REMAINDER TRUST*

BANK ACCOUNTS/CDs

OTHER

I/we wish to inform Alpha Sigma Phi, for long-term planning purposes only, that as of this date, the value of my/our gift is: \$ _____. ** (If your gift is a percentage of your estate, please indicate the approximate present value of that percentage). I/we understand that, by stating an amount, my/our estate is not legally bound by this statement and I may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion. (Alpha Sigma Phi requests notification any time you make changes or adjustments to your gift).

ADDITIONAL INSTRUCTIONS

Please enroll me/us in the Alpha Sigma Phi Manigault Society:

I/we wish my/our name(s) to appear as: _____ in any form of recognition

Date

Donor(s) Signature

Donor(s) Signature

PLEASE RETURN SIGNED AGREEMENT TO ALPHA SIGMA PHI FOUNDATION AT 710 ADAMS STREET, CARMEL, IN 46032

* If your CRT beneficiary or life insurance policy is irrevocable, please enclose a copy of the trust document for enrollment in an additional recognition society.

** We hope that you will share the approximate amount of your gift with us so that the benefitting endowment or the Foundation will know of your generosity and be able to recognize you appropriately. It is also helpful for us to have on file any supporting documentation which you may be able to share with us. Please attach if possible.

Alpha Sigma Phi Foundation is a 501(c)3 non-profit organization. Your donation may qualify as a charitable deduction for federal income tax purposes. Please consult your tax advisor or the IRS to determine whether your contribution is deductible.

ALPHA SIG

1845

TM