



PI BETA PHI Foundation Legacy Gift Notification Form

1. MY LEGACY GIFT

I confirm that I have provided the following bequest gift for Pi Beta Phi Foundation effective _____ (date of trust/gift agreement/beneficiary form). This commitment is made in support of Pi Beta Phi Foundation's values of integrity, philanthropic passion, fraternal and community commitment, and trustworthy stewardship.

Gift Detail:

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

Specific Cash Bequest:

- Cash gift of \$_____.
- Percentage of estate gift, estimated current fair market value of \$_____.
- Residual interest in estate gift, estimated current fair market value of \$_____.

Specific Asset(s):

- Life Insurance policy gift, estimated current fair market value of \$_____.
- IRA account gift, estimated current fair market value of \$_____.
- Payable on Death gift (bank account, CD), estimated current fair market value of \$_____.
- Other Asset gift: _____ (describe asset), estimated current fair market value of \$_____.
- Charitable Trust gift: ____% of the charitable remainder trust, estimated current fair market value of \$_____.

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.

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.

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 (next page) and may be expended or added to an affiliated endowment at the discretion of the Board of Trustees.

Notes:

Please see reverse to complete this form.



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2. GIFT DESIGNATION

- To designate your gift to:
Area of greatest need
- Leadership
- Education
- Literacy
- Sisters in Need
- Heritage
- Housing
- Select:
- Friendship Fund
- Chapter Leadership Endowment for _____
- Undergraduate Scholarships General Specific: _____
- Graduate Fellowships General Specific: _____
- Alumnae Continuing Education General Specific: _____
- The Literacy Fund
- Arrow in the Arctic/Canadian Philanthropies Fund
- Emma Harper Turner Fund
- Holt House Fund
- Chapter House Improvement Program Fund for _____ Chapter
- Educational Area Grant Program Fund for _____ Chapter

3. MY INFORMATION

Donor Name(s) _____

Address _____

City, State, Zip _____

Date of Birth(s) _____

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.

4. MY SIGNATURE

Signature _____

Date _____

Please Return To: Pi Beta Phi Foundation
1154 Town & Country Commons Drive
Town & 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.