

TAU BETA SIGMA LEGACY SOCIETY – STATEMENT OF INTENT

For the purpose of planning only, I/we indicate that I/we have named the Tau Beta Sigma Trust Fund as a beneficiary of the planned gift described below:

TYPE OF ARRANGEMENT

- | | |
|---|---|
| <input type="checkbox"/> Gift from Will or Living Trust | <input type="checkbox"/> Gift from Charitable Trust |
| <input type="checkbox"/> Gift from Retirement Plan | <input type="checkbox"/> Gift from Life Insurance |
| <input type="checkbox"/> Gift from Gift Annuity | <input type="checkbox"/> Other: |

SPECIFICS OF THE ARRANGEMENT

(WITH AS MUCH DETAIL AS YOU ARE COMFORTABLE SHARING)

- ☐ Specific current value: \$
- ☐ Approximate current value: \$
- ☐ Other details (such as % of estate)

PERSONAL INFORMATION

Name(s) _____

Date(s) of Birth _____

Mailing Address ☐ Home ☐ Business _____

City _____ State _____ Zip _____

Phone _____ Email Address _____

Signature(s) _____ Date _____

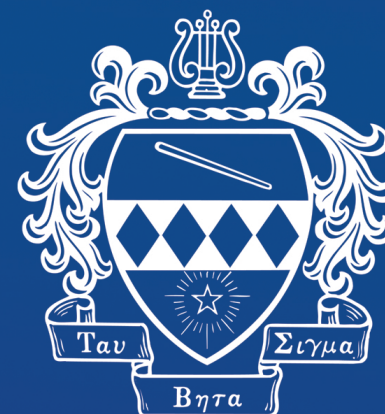
Preferred Name(s) for recognition in Podium of Legacy Society members or

- ☐ I/We wish to remain anonymous or
- ☐ I/We wish to remain anonymous during my/our lifetimes but may be named when the estate gift is received. (with as much detail as you are comfortable sharing)

Gifts to the Tau Beta Sigma Trust Fund are tax deductible as allowed by law.

Tau Beta Sigma is a 501(c)3 non-profit corporation.

Please return this form to KKΨ & TBΣ National Headquarters, PO Box 849, Stillwater, OK 74076



Leave A Legacy

*How do you
want to be
remembered?*

TAU BETA SIGMA
FOR GREATER BANDS

How do you want to be remembered?

Anyone can leave a legacy, and everyone can make a difference in the lives that follow.

Every member of the Tau Beta Sigma Legacy Society has chosen to create a legacy. Each individual is helping to shape the future of our organization. Through bequests and other planned gifts, Legacy Society members demonstrate dedication to Tau Beta Sigma and the programs they care about most.

You are invited to make your mark on the future, and remembered for your love and commitment.

Benefits of Membership

Recognition in Podium*
Recognition at National Convention*
Lapel Pin

**For those who wish to remain anonymous, we honor that request.*



How to Join the Tau Beta Sigma Legacy Society

Simply complete a "Statement of Intent" and return it to KΨΨ & TBΣ National Headquarters.

We are pleased to confidentially assist you, and to welcome you to this distinguished group of dedicated leaders.

Membership in the Tau Beta Sigma Legacy Society

Anyone who wishes to create a legacy is invited to join.

Members of the Legacy Society have worked hard and saved wisely.

They share a commitment to the future of Tau Beta Sigma.

Membership is offered to all individuals who have made a planned gift to the Tau Beta Sigma Trust Fund. There is no distinction made regarding the size and type of gift.

Examples of Planned Gifts

- Bequest through a will
- Gift through a living trust
- Beneficiary designation in a retirement plan
- Beneficiary designation or a gift of a life insurance
- Charitable remainder trust
- Charitable lead trust
- Stocks, Bonds, Annuities
- Remainder interest in a home or farm