

## 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

- ☐ Gift from Will or Living Trust    ☐ Gift from Charitable Trust  
☐ Gift from Retirement Plan    ☐ Gift from Life Insurance  
☐ Gift from Gift Annuity    ☐ Other: \_\_\_\_\_

### SPECIFICS OF THE GIFT (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,

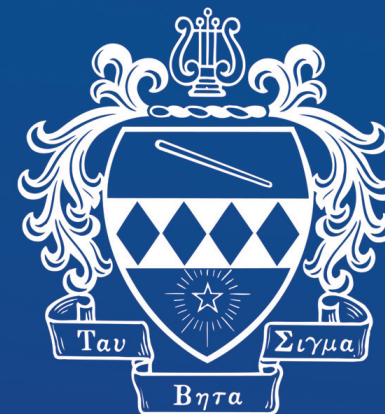
- ☐ I/we wish to remain anonymous, or  
☐ I/we wish to remain anonymous during my/our lifetimes, but may be named when  
the estate gift is received. (with as much detail as you are comfortable sharing)

### EXECUTOR/POWER OF ATTORNEY

Name \_\_\_\_\_ Email Address \_\_\_\_\_ Phone \_\_\_\_\_

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

*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.*



# Leave A Legacy

*How do you  
want to be  
remembered?*

TAU BETA SIGMA  
FOR GREATER BANDS

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## 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.

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## Benefits of Membership

Recognition in Podium\*  
Recognition at National Convention\*  
Lapel Pin

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



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## How to Join the Tau Beta Sigma Legacy Society

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

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

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## 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