



Sigma Phi Epsilon Educational Foundation Legacy Gift Confirmation

I believe in the vision of the Sigma Phi Epsilon Educational Foundation to provide opportunities for undergraduate members to seek and achieve a better life through its mission of building balanced men. As evidence of my desire to provide a legacy of support to the Sigma Phi Epsilon Educational Foundation, I hereby inform the Sigma Phi Epsilon Foundation that I have made a provision for a gift to the Fraternity in my estate plans.

Name: _____

Gift Designation: _____

Type of Legacy Gift: I have included Sigma Phi Epsilon Educational Foundation in my estate plans in the following manner(s):

- Bequest in a will or revocable trust
- Beneficiary designation on an account, retirement plan, or life insurance policy
- Beneficiary of a charitable remainder trust (CRT) or charitable gift annuity (CGA)
- Other _____

Gift amount (please indicate the estimated *current value* of your gift) : _____ *

- So long as the amount realized meets the minimum threshold, my gift shall be used to create a permanent endowment fund at the Sigma Phi Epsilon Educational Foundation.
- Information regarding my future gift shall be treated as confidential and may not be listed in any reports.
- I have included a copy of the documents pertaining to my future gift (will, trust, or beneficiary designation form).

Legacy Society Recognition: We are pleased to enroll you in the Sigma Phi Epsilon Legacy Society.

- I agree to have my name listed in SigEp publications and/or on the SigEp website as members of the SigEp Legacy Society. Please list my name as:

 I prefer to be listed as "Anonymous."

- Please do not include my name in the SigEp Legacy Society.

Signature: _____

Date: _____

*I understand that by providing a current estimate of my gift, my estate is not legally bound by this statement and that I may add, subtract, or revoke my estate gift at any time, in my sole discretion.

Thank you for your thoughtful investment in the future of Sigma Phi Epsilon. As with any decision involving your finances or estate, we strongly recommend that you seek the advice of attorneys or professional advisors before making a legacy commitment. Your signature verifies only that the above information is accurate and is in no way legally binding.