



### Legacy Gift Confirmation

This form is to help you provide information about your lasting legacy and future gift to Sigma Phi Epsilon. By sharing this information, you help to ensure that your gift will be used as you intended. This document is not considered to be a legal or financial obligation and will be kept confidential.

**Type of Gift:** I/We have included Sigma Phi Epsilon in my/our estate plans through one or more of the following planned gifts:

- Retirement plan beneficiary designation; estimated value of: \$ \_\_\_\_\_
- Insurance policy beneficiary designation; benefit of: \$ \_\_\_\_\_
- Bequest in will or revocable trust for the dollar amount of: \$ \_\_\_\_\_
- Bequest for \_\_\_\_\_% of my estate, an estimated value of: \$ \_\_\_\_\_
- Other \_\_\_\_\_; estimated value of: \$ \_\_\_\_\_
- **Total value of my legacy gift:** \$ \_\_\_\_\_

**Purpose of the Gift:** Many donors feel most confident that their gift intention will be honored when they provide SigEp with a copy of the section of the will that pertains to their gift. We welcome documentation of your gift in this way. If you prefer not to provide a copy of the bequest language, please indicate the purpose of your gift:

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**Legacy Society Recognition:** We are pleased to recognize your generosity to Sigma Phi Epsilon. Any planned gift that establishes SigEp as a beneficiary qualifies you for membership in the Legacy Society. **(Note: The specific amount of your gift is not published and remains confidential.)**

- ☐ List your name(s) as you would like it (them) in print:

\_\_\_\_\_

- ☐ Please do not list my/our names externally (Anonymous gift)

**Name (print):** \_\_\_\_\_ **Name (print):** \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*Thank you for your thoughtful investment in the future of Sigma Phi Epsilon. As with any decision involving your estate, we recommend that you seek the advice of professional counsel. Your signature verifies only that the above information is accurate and in no way binds you to your commitment.*

Please return to: **Sigma Phi Epsilon Educational Foundation, 310 S Arthur Ashe Boulevard, Richmond, VA 23220**  
Email: foundation@sigep.net Fax: 804-359-8160 Phone: 804-353-1901