Notification of a Bequest and/or Additional Planned Gift

Gifts of Bequests:

I have included a bequest to the TKE Foundation in my estate plan. The bequest is in the form of:

( ) a specific bequest in the amount of $____________________ or

( ) a gift of ________% of my estate after specific bequests have been fulfilled. Currently the amount represented by this percentage is approximately: $___________.

( ) I have attached a copy of my will/trust to this notice.

Beneficiary Designations:

( ) I have named the TKE Foundation as a remainder beneficiary in a piece of real property reserving a life estate for myself and my spouse. The estimated value of the property at this time is $______________. 

( ) I have attached a copy of the deed to this notice.

( ) I have named the TKE Foundation as a beneficiary of my life insurance policy. The TKE Foundation is a _______________% beneficiary of the policy.

   Policy #____________________________

   Insurance Carrier: ________________________________

( ) I have named the TKE Foundation as a beneficiary of my 401(k) or other retirement account. The TKE Foundation is a _______________% beneficiary of the account.

Additional Planned Gifts:

( ) I have made the following planned gift to the TKE Foundation: _______________. The estimated value of this gift is $______________.

I direct that my gift be used as follows:

( ) where needed most;

( ) for undergraduate scholarships for TKE members, especially ________________;

( ) for graduate scholarships for TKE members;

( ) to defer the expenses of current chapter officers to attend annual conventions or meetings.

( ) Other _______________________________________________________________

Printed Name: ____________________________

Signature: ____________________________ Date: ____________