

### 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: \_\_\_\_\_