

**TEXAS KAPPA SIGMA
EDUCATIONAL FOUNDATION, INC.**



**The Tau Trustees
Educational Foundation**

**TAU TRUSTEES EDUCATIONAL
FOUNDATION, INC.**

ESTATE / PLANNED GIFT FORM

1) The beneficiary identified is:

- a. ☐ The Texas Kappa Sigma Educational Foundation (established as non-tax-deductible, not-for-profit entity)
- b. ☐ The Tau Trustees Educational Foundation (established as tax-deductible, not-for-profit entity)
- c. ☐ Other

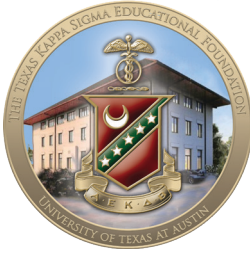
2) I have included the following type of gift:

- a. ☐ Request in (or Codicil to) my Will
- b. ☐ Paid-Up Life Insurance Policy designating TKSEF or TTEF as owner and irrevocable beneficiary
- c. ☐ Trust gift with TKSEF or TTEF as beneficiary

3) My estate plans have changed as follows:

4) My gift is to be used as follows:

- a. ☐ Unrestricted
- b. ☐ Current support restricted to _____
- c. ☐ Permanently restricted support to the following area: _____
 - i. ☐ Undergraduate Student Scholarships
 - ii. ☐ Funding of Educational Space in the Lodge or Residence Hall
 - iii. ☐ Other



**TEXAS KAPPA SIGMA
EDUCATIONAL FOUNDATION, INC.**



**TAU TRUSTEES EDUCATIONAL
FOUNDATION, INC.**

ESTATE / PLANNED GIFT FORM

5) I am enclosing documentation related to Estate / Planned Gift.

6) Recognition to be written as follows:

- a) _____ In memory of:
- b) _____ In honor of:
- c) _____ Other

Name

Date

Signature