



LEGACY GIFT AGREEMENT

This agreement is made on _____, is to summarize the mutual understanding of _____ (the Donor) and the Student Excellence Foundation (formerly the Network for Educational Excellence in Wheaton-Warrenville (NEW 200 Foundation)) EIN # 36-3786044, regarding the establishment of a Planned Gift. This agreement will be made part of the Foundation's records and is intended to serve as documentation for the Donor, the Foundation, and District 200.

The Student Excellence Foundation is included in my estate as follows:

- | | |
|---|--------------------------|
| <input type="checkbox"/> Bequest from my will: | Amount \$_____ or _____% |
| <input type="checkbox"/> Life insurance beneficiary: | Amount \$_____ or _____% |
| <input type="checkbox"/> IRA or other pension asset beneficiary: | Amount \$_____ or _____% |
| <input type="checkbox"/> Charitable remainder trust distribution: | Amount \$_____ or _____% |
| <input type="checkbox"/> Other: _____ | Amount \$_____ or _____% |

The Student Excellence Foundation may list my/our gift in its Legacy Society as follows:

- _____
- I wish to remain anonymous.

The Gift will be directed toward the General Fund for enhancing educational opportunities for students unless other specified.

Attorney and/or Executor:

Attorney: _____ Email: _____

Address: _____ Phone: _____

Executor: _____ Email: _____

Address: _____ Phone: _____

Print Name: _____ Title: _____

Signature: _____ Date: _____