



INSTITUTE FOR
**CITIZENS &
SCHOLARS**

Advancing Fellowship Since 1945

THE FELLOWS LEGACY SOCIETY MEMBERSHIP FORM

Providing information about your bequest or estate gift to the Institute for Citizens & Scholars enables us to plan and administer your gift in accordance with your wishes. It is helpful, but not a requirement, for us to have on file any supporting documentation that you are willing to share with us. Such documentation might include a copy of the relevant pages of your will or trust, or your beneficiary designation form. Additionally, the Institute for Citizens & Scholars respectfully requests notification should you make changes or adjustments to your planned gift. Your information will be kept strictly confidential.

INFORMATION ABOUT YOUR PLANNED GIFT:

I/We have named the Institute for Citizens & Scholars in my/our estate plan as follows:

- | | |
|--|---|
| <input type="checkbox"/> Will/Living Trust | <input type="checkbox"/> Charitable Lead Trust |
| <input type="checkbox"/> IRA or Retirement Plan | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Beneficiary of Donor Advised Fund | |

It is my/our desire that this gift be used:

- Where the need is greatest; or
- To benefit the following program: _____

Present estimated value of gift: _____, as of _____
(date)

INFORMATION ON HOW WE SHOULD ACKNOWLEDGE YOUR GIFT

Feel free to publish my name (and/or my spouse's name) among the list of Fellows Legacy Society members to help inspire others to leave a future gift to benefit the organization. My name (and/or my spouse's name) should be listed as: _____

(print)

I/We would like this to be an anonymous gift.

By _____
(signature) (date)

By: _____
(signature) (date)

Name:

(print)

Address:

City:

State:

Zip Code:

Phone: `

Email:

Birthday:

I understand that my estate is not legally bound by this intention and I may choose to add, subtract, or revoke it at any time at my sole discretion.

Please return this form to: Steve Haddad, Development Office, Institute for Citizens & Scholars, 104 Carnegie Center, Suite 301, Princeton, NJ 08540 or by email to haddad@citizensandscholars.org.