



## The Living Bond Society Confidential Documentation Form

The Living Bond Society recognizes those alumni and friends who have included the Phi Delta Theta Foundation in their estate plans.

As a generous donor to the Phi Delta Theta Foundation, your wishes pertaining to your gifts are of paramount importance to us. This non-binding documentation form helps to insure that the Trustees and Staff of the Foundation clearly understand your wishes and your intentions. Please complete and return this form to the address listed on the back.

Thank you again for your support of future generations of Phi Delta Theta members through the Foundation.

### Member Information:

_____	_____	_____
Preferred Name	Spouse's Preferred Name	Children's Names
_____	_____	_____
Preferred Mailing Address	City	State Zip Code
_____	_____	_____
Home Phone Number	Work Phone Number	E-mail Address
_____	_____	
Chapter	Class Year	

**Living Bond Society Instrument or Provision:** I have made provisions for the Phi Delta Theta Foundation in my estate plan through one or more of the following gift vehicles:

- A bequest in my will
- An insurance policy naming the Foundation as
  - the beneficiary.
  - the policy owner.
- A charitable gift annuity
- A charitable remainder trust
- Other estate provisions (please describe): \_\_\_\_\_

**Purpose**

The Board of Trustees of the Foundation will make every attempt to follow your wishes as closely as possible. Please help us by indicating how you would like your gift to be used. Please contact a Foundation representative if you would like additional information about these or other options.

\$ \_\_\_\_\_ or \_\_\_\_\_ % unrestricted for the greatest needs of the Foundation, as determined by the Board of Trustees

\$ \_\_\_\_\_ or \_\_\_\_\_ % for the specific purposes of \_\_\_\_\_

Although not required, it is often helpful for the Foundation to have in its confidential files a copy of the applicable excerpts from your will, trust agreement, or other documents pertaining to your provisions.

The estimated value in today's dollars of this gift is: \$ \_\_\_\_\_

**No information about your gift will be released without your prior approval.** From time to time, the Foundation will publish a list of donors who are members of The Living Bond Society. By doing so, others are encouraged to think about the possibilities of including Phi Delta Theta in their estate plans. May we have your permission to include your name(s) in our list of Living Bond Society members?

Yes, please include my (our) name(s) as member(s) of The Living Bond Society.  
Please list as follows: \_\_\_\_\_

No, I prefer to keep this information confidential.

\_\_\_\_\_  
Your signature

\_\_\_\_\_  
Date



**The Phi Delta Theta Foundation, 2 South Campus Avenue, Oxford, OH 45056**  
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**The Phi Delta Theta Foundation is a qualified 501(c)(3) organization.**  
**Federal Tax ID # 34-6539803**