



## Membership in the Heritage Society

In recognition of my confidence in the work of the Tri Sigma Foundation, I confirm that I have made a bequest or planned gift to the Tri Sigma Foundation thus confirming membership in the Heritage Society.

Name: \_\_\_\_\_ Chapter: \_\_\_\_\_ Initiation Year: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_ City, State & Zip: \_\_\_\_\_  
Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
Email Address: \_\_\_\_\_

I/we have made a provision for the Tri Sigma Foundation in my/our estate plans to support the mission of providing resources to empower. *Please check as many as apply.*

- A stated gift in my/our will
- A percentage of my/our estate or residual estate
- I/we have included the Tri Sigma Foundation as beneficiary or partial beneficiary of the asset indicated below:
  - Retirement Plan
  - Life Insurance Policy
  - Other asset \_\_\_\_\_

I request the funds be used for the following:

- Ever True Fund; to be used for the area of greatest need
- Scholarships
- Other

Estimated value of gift to the Tri Sigma Foundation: \$ \_\_\_\_\_

You may publish my/our names, without any dollar amounts, in our list of Heritage Society members as a motivation for others to leave a planned gift.

Signature \_\_\_\_\_ Date \_\_\_\_\_

*The estimated value is to be kept confidential. If your gift is a percentage of your estate, please indicate the approximate value. I/we understand that by stating an amount my/our estate is not legally bound by this statement and that I/we understand that by stating an amount my/our estate is not legally bound by this statement and that I/we may choose to add, subtract or revoke this bequest at any time, at my/our sole discretion.*

**Please return this form via mail: Tri Sigma Foundation, 225 N. Muhlenberg Street, Woodstock, VA 22664 or email: [csmithhisler@trisigma.org](mailto:csmithhisler@trisigma.org)**

*The Sigma Sigma Sigma Foundation is an IRS Code 501(c)(3) organization, Federal Identification #52-1370798. All gifts to the Foundation are tax deductible as allowed by law.*



## A Planned Gift: Providing for What Means the Most to You

**Has Tri Sigma held a special place in your heart?** Give your sisters the opportunities that Tri Sigma gave you by including the Foundation as a beneficiary, or partial beneficiary, of your life insurance, 401k, or estate. It is often as easy as including a sentence in your will or filling out a change of beneficiary form.

***It costs nothing today, but it is a priceless gift empowering women for generations to come. Make a difference with the legacy you leave.***

### Naming the Foundation in Your Estate Plans

The following language may help you and your attorney when drawing up a bequest that meets your needs:

*"I give, devise or bequeath to Sigma Sigma Sigma Foundation, Inc., a charitable institution located at 225 North Muhlenberg Street, Woodstock, VA, 22664, the sum of \$\_\_\_ for its general purposes or \_\_\_% of the remainder of my estate."*

**Legal name:** Sigma Sigma Sigma Foundation, Inc.

**Address:** 225 N. Muhlenberg Street, Woodstock, VA 22664

**Federal Tax ID number:** 52-1370798

Your personal intentions regarding any restrictions of your gift may be added where applicable. For information on specific funds, please contact Chris Smithhisler, Advancement Officer at 317.373.1347 or [csmithhisler@trisigma.org](mailto:csmithhisler@trisigma.org).

### Naming the Foundation in Other Estate Plans

Many other estate planning exist that can help the Foundation in the future. Women often name the Foundation as a beneficiary on their IRAs, their insurance policies, and their retirement plans. The Foundation can be named as a recipient of a charitable trusts or annuity, which may provide lifetime giving for you and your family, with an eventual charitable gift to the Foundation.

**Join our Heritage Society today by notifying us of your plans! We want to recognize you now for your thoughtful gift. For more information, please contact Chris Smithhisler, Advancement Officer at 317.373.1347 or [csmithhisler@trisigma.org](mailto:csmithhisler@trisigma.org).**