

Heritage Society / Estate Gift Information

As an investment in the future of Kappa Sigma Fraternity and in consideration of the gifts of others for the same purpose, I intend to include the Kappa Sigma Endowment Fund and/or Kappa Sigma Fraternity in my estate by way of:

I. I have established the following type of estate gift:

- Bequest (codicil) in my Will
- Paid-Up life insurance policy with Kappa Sigma as owner/beneficiary.
- Trust gift with Kappa Sigma as beneficiary.
- Other / I prefer to make my gifts per the following special instructions:

II. The beneficiary identified is:

- The Kappa Sigma Fraternity (non tax-deductible)
- The Kappa Sigma Endowment Fund (charitable entity, tax-deductible)
- Other: _____

III. My gift is to be used in the following fashion:

- Unrestricted (direct to any and all programs)
- Current support restricted to: _____
- Permanently restricted support (an endowment) to the following program area:
 - Named Scholarship-Leadership Award (min. \$25,000)
 - Chapter Scholarship Fund (for _____ Chapter)
 - Other: _____

IV. () I have enclosed documentation related to my Heritage Society gift which will assist the Endowment Fund in honoring my charitable goals.

_____	Name	_____	Signature
_____	Address	_____	Date
City	State	Zip	Name (please print)
_____	Phone	_____	Chapter

Kappa Sigma Endowment Fund is a general welfare organization having tax exempt status under the IRS Section 501(c)(3). Gifts to the Endowment Fund are tax deductible as allowed by law.

**Fax or Mail to:
Kappa Sigma Endowment Fund
PO Box 5643 • Charlottesville, VA 22905-5643
F: (434) 296-5733 • P: (434) 979-5733**