
NOTICE OF ESTATE PROVISION

I hereby notify you that I have included Point Foundation as a beneficiary of my estate plan, by making a provision with the approximate value of \$ _____, (or percentage of residuary) in the following manner:

(e.g., will, IRA beneficiary designation, insurance policy, revocable living trust, remainder trustee, charitable trust etc.)

This indication of intent does not prevent my amending an otherwise revocable provision I have made for the Foundation in the future. I agree to notify Point Foundation of such a rescission.

I hereby give consent to Point Foundation to recognize my commitment to its efforts to provide financial support, mentoring and hope to meritorious students who are marginalized due to sexual orientation or gender identity. If the value amount of my bequest as indicated above is \$100,000 or more, I will become a member of the Point Legacy Circle. If I authorize it, my name will be published in the Foundation's annual report, as well as and other appropriate publications. I have checked the box which corresponds to the manner of recognition I desire below.

- I consent to be acknowledged in the following manner:
- In the annual report and other appropriate publications. Please list my (our) name(s) as:

I prefer to be anonymous.

SIGNATURE (DONOR #1)

DATE

SIGNATURE (DONOR #2 IF APPLICABLE)

DATE

ADDRESS

PHONE

E S T A T E P L A N N I N G I N S T R U C T I O N S

Please remember The Point Foundation as you plan the details of your estate. Point Foundation is the nation's largest scholarship-granting organization for lesbian, gay, bisexual and transgender (LGBT) students of merit. Make sure that your legacy lives on by investing in the future leaders of our community.

To honor, memorialize, and thank those friends of Point Foundation who have arranged a bequest or planned gift to the Foundation, we have established the Point Legacy Circle. Anyone who notifies Point Foundation that they have named the Foundation as a beneficiary of a bequest or planned gift of over \$100,000 will automatically be enrolled as a member.

Members of the Point Legacy Circle receive certain benefits. These currently include designation in the Point Foundation newsletter (if authorized by you) and invitations to select Foundation events. Benefits can also include a named scholarship (your name or a loved one's name) at a specific institution you select. This will ensure your generosity endures for generations to come.

If you wish to discuss your specific wishes for your gift, or if you would like assistance in structuring a gift please call Point's development office at 866-337-6468.

SAMPLE LANGUAGE

Here is some sample language to use when writing your will/trust:

If you would like to leave a gift to Point Foundation:

"I hereby give and bequeath to Point Foundation, a tax exempt, not -for-profit, charitable institution with federal tax identification number 84-1582086 (the sum of \$ _____ dollars.) Or (___ % of my residual estate.)

If leaving a gift of real estate:

"I devise and bequeath to Point Foundation, a tax exempt, not -for-profit, charitable institution with federal tax identification number 84-1582086 real property located at _____, together with all buildings and improvements located that are on and all insurance policies relating thereto."

If leaving your entire estate:

"I bequeath my entire estate to Point Foundation, a tax exempt, not -for-profit, charitable institution with federal tax identification number 84-1582086."

If you want to leave a donation to Point Foundation in the event that the party you originally intended the gift for predeceases you (contingent beneficiary):

"If any of the foregoing bequests shall lapse, then I bequeath to Point Foundation, a tax exempt, not -for-profit, charitable institution with federal tax identification number 84-1582086 such bequests as to which an ineffective disposition was made."

If you want to leave parts of your estate to others and the remainder to Point foundation (residuary legatee):

"All the rest, residue, and remainder of my estate, both real and personal, wherever located, I devise and bequeath to Point Foundation, a tax exempt, not -for-profit, charitable institution with federal tax identification number 84-1582086."

If you want to leave assets to an individual (such as a partner or child) for use during their lifetime, but direct it to Point Foundation upon his or her death:

In this case, a more sophisticated vehicle, such as a charitable trust or pour-over trust, may be most effective. Please discuss this with your estate planner.

For further information about the Point Legacy Circle, please call 866-337-6468.