



Bernal Dever Legacy Society Membership Agreement

It is my desire to provide a legacy of support students and teachers in San Antonio ISD. I am pleased to inform you that I intend to provide a planned gift from future assets or an endowed perpetual gift from current assets to support the work of the San Antonio Foundation for Excellence in Education, Inc. dba SAISD Foundation (Tax ID 74-2861587).

Planned Gifts

I understand that any planned gift from future assets is revocable and can be modified by me at any time during my lifetime. I further understand that I (or my estate) am not legally or morally obligated to fulfill this planned gift intention if I choose to modify or cancel such planned gift at a later date.

I have provided for a gift to the San Antonio Foundation for Excellence in Education, Inc. dba SAISD Foundation in my will in the form of one of more of the following: revocable trust; charitable trust; beneficiary of a retirement plan, life insurance policy, IRA, 401 K or 401B; or other planned giving _____ (please indicate type of gift by circling one of the aforementioned options or entering in the type of gift). I estimate the current value of this gift to be \$ _____. Please provide a copy of the selected document or beneficiary documentation.

Endowed Gifts

Endowed gifts from current assets can be made as a one-time gift, as a pledge with an annual payment plan, or as a part of a planned gift from future assets. If you are making an endowed, perpetual gift from which only interest is paid out annually from current assets, please work with SAISD Foundation staff to establish an endowment agreement in addition to providing this membership notification.

All planned giving and endowment donors qualify for inclusion and recognition as members of the Bernal Dever Legacy Society including special events and recognition at events and programs. Inclusion allows the SAISD Foundation to express continued gratitude for your intended gift from future assets or your current endowed gift and allows your gift intention or current contribution of a perpetual gift to serve as encouragement to others.

Please check one:

Yes, please include me as a member of the Bernal Dever Legacy Society. My/Our family names(s) should be listed as follows: _____

Yes, please include me/us as a member, but I/we would like to remain anonymous.

Signature: _____

Name (please print): _____

Date: _____ Phone: _____ Email: _____

Thank you for your generous and vital support of students and teachers in San Antonio ISD through the San Antonio Foundation for Excellence in Education, Inc. dba SAISD Foundation!

