



BERNAL-DEVER LEGACY SOCIETY MEMBERSHIP AGREEMENT

All planned giving and endowment donors qualify for inclusion and recognition as members of the Bernal-Dever Legacy Society and its events and programs. Inclusion allows the SAISD Foundation to express continued thanks for your intended or endowed gift and allows your gift intention to serve as encouragement to others to invest in students in San Antonio ISD.

It is my desire to provide a legacy of support for the San Antonio Foundation for Excellence in Education, Inc. dba SAISD Foundation and am doing so through a planned gift or an endowed gift to benefit SAISD Foundation (Tax ID 74-2861587).

I understand that any planned gift is revocable and can be modified by me at any time. I further understand that I (or my estate) am not legally or morally obligated to fulfill this 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 or have directly names the public charity as a beneficiary of in the form of a retirement plan, life insurance policy, charitable trust, planned gift, revocable trust, IRA, 401K, 401B; or other _____ (please indicate type of gift by circling one of the aforementioned options or entering in the type of gift on this line). If a specific purpose has been noted for the funds beyond supporting the work with the SAISD Foundation, please list it here: _____.

Please check all that apply:

_____ 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.

_____ I would like to meet with the staff of the SAISD Foundation to share my intentions for this gift.

_____ I would like to disclose the allotment amount or estimated value of the gift. (Optional)

_____ I would like to provide a copy of the beneficiary documentation (Optional)

Signature: _____

Name (please print): _____

Date: _____ Phone: _____

Email: _____

