

Kathy Taurel Legacy Society

LEGACY GIFT NOTIFICATION FORM

Thank you for your generosity to International School of Indiana. This form is a confidential record and is provided to help you convey your charitable intent to International School of Indiana. If possible, please provide a copy of the page(s) or section of your will, trust or beneficiary document that describes your provision for the bequest gift for International School of Indiana, and the title page of the bequest/trust document with this form.

DONOR INFORMATION

Name: _____

Address: _____

Phone: _____ Email: _____

ISI Affiliation: Alumni Parent Faculty/Staff Friend Other _____

GIFT DETAIL

I am making the following gift(s) through my estate plan:

Specific Cash Bequest:

- Cash gift
- Percentage of estate gift _____%
- Residual interest in estate gift

Specific Asset(s):

- Life Insurance policy gift
- IRA account gift
- Payable on death gift (bank account, CD)
- Percentage of Charitable Trust: _____%
- Other asset gift

Please describe asset: _____

GIFT VALUE

- My gift (s) have an actual value of \$ _____.
- My gift(s) have an estimated fair market value of \$ _____

ACKNOWLEDGEMENT

- I am willing to be publicly acknowledged.
- I prefer not to be listed or acknowledged publicly.

This statement of intent is not a legal obligation and may be changed at my discretion. Gifts to a permanent endowment are invested in perpetuity and may be merged or pooled for investment purposes with the general endowment or other assets of the International School of Indiana and be managed and invested in accordance with School policy and procedure.

Signature: _____

Date: _____

Please return your Form to:
INTERNATIONAL SCHOOL OF INDIANA
ADVANCEMENT OFFICE
4330 N MICHIGAN ROAD
INDIANAPOLIS, IN 46208

