



## Planned Gift Pledge Form

☎ 317-988-7966 ✉ Lisa.Baize@wayne.k12.in.us 🌐 wtef.wayne.k12.in.us

This form will help you provide information about your legacy gift to the Wayne Township Education Foundation. By sharing this information, you can help ensure that your gift will be used in accordance with your wishes. If this is a joint gift, please complete the spouse/partner fields and signature.

Name:	Spouse/Partner:
Date of Birth:	Date of Birth:
Email Address:	Email Address:
Street Address:	City, State Zip:

Gift Vehicle: Please describe your legacy gift. Select one of the following options.

- |  |   |
|--|---|
| <input type="checkbox"/> Will                                    | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Retirement Plan Beneficiary Designation | <input type="checkbox"/> Charitable Gift Annuity    |
| <input type="checkbox"/> IRA Qualified Charitable Contribution   | <input type="checkbox"/> Charitable Lead Trust      |
| <input type="checkbox"/> Life Insurance Beneficiary Designation  | <input type="checkbox"/> Other: _____               |

Gift Description: How would you like Wayne Township Education Foundation to use your gift? (for example, unrestricted use, curricular area support, scholarship, school)

- ☐ Please use my gift where it is most needed.  
☐ Other: \_\_\_\_\_

Estimated Value (optional): Please provide an estimate of the current value of your legacy gift to Wayne Township Education Foundation. All such information will be kept confidential. This estimate does not bind you or your estate in any way. Estimate: \_\_\_\_\_

Legacy Society: Select one of the following options.

- ☐ Yes, I/we would like to be listed as a member of the Giant Futures Legacy Society.  
☐ Yes, I/we would like to be a member of the Giant Futures Legacy Society but as "Anonymous."  
☐ No, please do not include me/us in the Giant Futures Legacy Society.

Signature::	Date:
Spouse/Partner Signature:	Date:

This document does not bind you or your estate. By signing this form, you are simply acknowledging your current plans to support Wayne Township Education Foundation in the future and to give us guidance as to your wishes.



## Legacy Giving through Planned Gifts

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**"Your last will and testament is your final teaching. What do you want that to say?"**  
- Rabbi Mordechai Liebling

When you make a planned gift to Wayne Township Education Foundation (WTEF), you are continuing a tradition to advance access to academic opportunities for all students in the M.S.D. of Wayne Township.



Making a gift by including WTEF in your long-term financial or estate plan is a decision that encompasses more than financial goals and tax benefits. This decision harnesses your passion to make a lasting impact. Planned gifts provide meaningful support of Wayne Township's students, while helping you achieve your own personal and financial goals.



WTEF staff can help you find the best option to honor your love for Wayne Township.

# Ways to Include WTEF in Your Planning

## Gifts During Life

### IRA Qualified Charitable Distribution

If you're 70 ½ or older, this is a tax-smart way to make a gift to WTEF while decreasing your taxable income. If you are 72 or older, these gifts will also help meet your Required Minimum Distribution.

### Appreciated Securities

In planning for charitable giving during life, gifts of appreciated assets are tax-smart assets to contribute to WTEF. Giving appreciated stock, bonds, or mutual funds to support WTEF may provide you with a charitable income tax deduction while also avoiding capital gains tax liability.

## Gifts After your Life

### Beneficiary Designation

Naming WTEF as the beneficiary of a retirement account, insurance policy, or bank or brokerage account may offer significant tax benefits and is easy to update should your plans change in the future.

### Gift in your Will

One of the simplest ways to create a legacy with WTEF is in your will or trust. You can leave a specific amount, percentage, all, or a portion of the remainder of your estate to the program or school that is meaningful to you.

By providing annual gifts to WTEF for a period of years with the remainder benefitting you and/or other beneficiaries at the end of the trust term, charitable lead trusts are a creative way to pass on assets to your family while reducing or eliminating gift or estate taxes.

Gifts of art, collections, other personal property, or real estate may be a meaningful way to make a gift to WTEF.

This contract with WTEF provides fixed payments for life for you and/or a loved one, and after the lifetime(s) of the beneficiary(ies) the remaining assets benefit the school or program that is meaningful to you.

This trust vehicle generates fixed or variable income for you and/or other beneficiaries for life or a term of years, with the remainder of the assets in the trust distributed as a gift to WTEF at the end of the trust term.

## Charitable Lead Trust

## Personal Property & Real Estate

## Charitable Gift Annuity

## Charitable Remainder Trust



**Contact us today to learn more about how you can leave a legacy that will benefit our students for years to come.**



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