DELPHI SOCIETY

MEMBERSHIP RECOGNITION

The Delphi Society is a group of special friends of the Shelton School who help ensure the future well-being of the school by including Shelton in their long-term financial or estate planning. The Delphi Society offers Shelton School the opportunity to express gratitude to members, and provides motivation for others to leave a future gift. We understand that as circumstances change, you may alter your plans to meet your needs and those of your family.

I / We hereby acknowledge membership in the Delphi Society of Shelton School, affirming that Shelton School is included in my/our long-term estate or financial plans:

Name(s) _____

Address _____

City _____ State _____ Zip Code _____

Phone Number _____ Email _____

The following information about your gift will help Shelton plan for the future.

I/We are pleased to acknowledge that I/We have named Shelton School as a beneficiary of:

- ☐ Will/Living Trust
- ☐ Retirement Plan
- ☐ Life Insurance Policy
- ☐ Donor Avised Fund
- ☐ Charitable Remainder Trust
- ☐ Charitable Gift Annuity
- ☐ Payable/Transfer on Death Account
- ☐ Other

My/Our gift is:

- ☐ Unrestricted ☐ Designated specifically for: _____
- ☐ Not yet determined. Please contact me to discuss options.

Optional, but helpful information:

The estimated present value of my/our gift is: _____

- ☐ Please record my/our membership as anonymous.

Signature(s)

_____

_____

Date ...../ ...../ .....

Please return signed copy, along with relevant documents
to Julie Griffith at jgriffith@shelton.org or
17301 Preston Road
Dallas, TX 75252

SHELTON

ENGAGE, ENRICH, **EMPOWER**