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## SUMMIT SOCIETY DECLARATION OF INTENT

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The Summit Society is our giving society for those who have included the Foundation in their estate plans. I have included the Alpha Delta Pi Foundation in my estate plans through my:

- Will  Living Trust  Retirement Plan or IRA  
 Life Insurance  Charitable Gift Annuity  Charitable Remainder Trust  
 Other (please describe) \_\_\_\_\_

Please recognize me in Summit Society displays and future publications as follows. Keep in consideration first name, middle initial or name, maiden name, last name, and chapter. Titles such as Mrs/Ms/Dr/Hon will not appear.

\_\_\_\_\_ is the preferred way to list my name

\_\_\_\_\_ chapter name

Please also include my spouse's name as \_\_\_\_\_

### Confidential Information

Approximate amount \$ \_\_\_\_\_ or \_\_\_\_\_ %

Other (please describe) \_\_\_\_\_

I/we have included a copy of the portion of my/our estate document that names the Alpha Delta Pi Foundation as a beneficiary.

Name \_\_\_\_\_ D/O/B \_\_\_\_\_

Spouse's Name \_\_\_\_\_ D/O/B \_\_\_\_\_

Home Address \_\_\_\_\_

Preferred Phone Number \_\_\_\_\_

I/we wish to direct my/our support to the following:

- Where the need is greatest  
 For a specific purpose within the Foundation (please specify) \_\_\_\_\_  
 I'm not sure and would like to discuss my designation options with you

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Executor's Name and Contact Information

\_\_\_\_\_  
Date