



BEQUEST INTENTION FORM

Thank you for informing us of your intention to include the Alabama School of Mathematics and Science Foundation in your estate plan to support our mission of educating Alabama’s next generation of leaders, scholars, and innovators. In order to accurately document your intention, please complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation.

You can make a specific gift of cash, securities, real estate or other property through your will, codicil or trust instrument. You can also designate the ASMS Foundation as the beneficiary of all or part of the remainder of your estate or trust after the payment of estate-related expenses, other bequests, or following the death of a spouse or other primary beneficiaries. Another way to include the ASMS Foundation in your estate plan is to name the Foundation as a beneficiary of your retirement plan or life insurance policy.

Final approval of gift acceptance rests with the ASMS Foundation Board of Directors.

Type of Bequest: The following information is helpful to the Foundation for planning purposes. Please check all that apply and estimate the value of each gift in today’s dollars. If you have named the Foundation as a percentage beneficiary, please indicate the dollar value of the Foundation’s percentage so that we can appropriately recognize you for your generosity.

<input type="checkbox"/> Will: \$ _____	<input type="checkbox"/> Insurance policy: \$ _____
<input type="checkbox"/> Revocable living trust: \$ _____	<input type="checkbox"/> Real estate (describe below): \$ _____
<input type="checkbox"/> Charitable remainder trust: \$ _____	<input type="checkbox"/> Other asset (describe below): \$ _____
<input type="checkbox"/> Retirement plan/IRA: \$ _____	Is this gift to the ASMS Foundation contingent on another beneficiary surviving you? <input type="checkbox"/> No <input type="checkbox"/> Yes
Additional Information: _____	

Designating a Purpose: When planning your gift, you will need to consider how you would like your gift to be used to benefit ASMS in the future, whether to designate your gift to the school’s most current needs, or benefit specific programs, scholarships, faculty or other needs. To best accomplish this, and to have an enduring record of the background for your gift, we will work with you to review or provide you with specific language to benefit your program of choice. It will also allow us to keep you apprised of new programs or developments that may impact your intention.

Please contact the Vice President for Development and Outreach or refer to the information on the following pages for specific bequest or endowment language.

Appreciation and Recognition: Documenting your intentions also allows the ASMS Foundation to recognize you now for your future gift. All planned giving donors are automatically enrolled as members of The 1989 Society,



which recognizes and honors the generosity of alumni, parents, faculty, staff and friends who are leaving a legacy for future generations of ASMS students. As a Society member, you will be invited to special events as well as receive a memo of our appreciation. You may also decline membership, or you can remain anonymous and we will exclude your name from any donor listings.

Documenting your Bequest: To document your bequest, we respectfully request the following item(s) be sent to the the individual and address below.

- _____ Completed Bequest Intention Form (this form) and a copy of one of the folowing documents (if available):
- _____ Portion of your will or trust document referencing the Alabama School of Mathematics and Science Foundation
- _____ Portion of your beneficiary designation form with available pertinent plan information (plan type, name of account owner, plan administrator, most recent market value information)
- _____ signed gift agreement detailing the use of your gift by the ASMS Foundation.

Documenting your bequest solidifies a lifelong relationship that allows you to participate in planning for ASMS's future. Thank your present and future support of the Alabama School of Mathematics and Science.

Donor(s)

Date

Donor(s)

Date

Dr. Samantha Church
Vice President for Development and Outreach
ASMS Foundation

Date

Please return this signed form along with documentation to:

***Dr. Samantha Church
Vice President for Development and Outreach
1255 Dauphin Street
Mobile, AL 36608***



Bequest Language

To make a bequest, you should speak with your attorney. Your attorney will assist you in including a bequest to the ASMS Foundation in your estate plan. We have provided some basic bequest language to assist you and your attorney.

1. Specific Bequest

If you are considering making an outright bequest to the Alabama School of Mathematics and Science Foundation, we recommend the following language:

Bequest of a Specific Dollar Amount

I hereby give, devise and bequeath _____ and 00/100 dollars (\$DOLLARS) to the Alabama School of Mathematics and Science Foundation, a nonprofit organization located at 1255 Dauphin Street, Mobile, AL 36604, Federal Tax ID #57-0902925, for ASMS (the school) general use and purpose.

Bequest of Specific Personal Property

I hereby give, devise and bequeath _____ DESCRIPTION OF PROPERTY to the Alabama School of Mathematics and Science Foundation, a nonprofit organization located at 1255 Dauphin Street, Mobile, AL 36604, Federal Tax ID #57-0902925, for ASMS (the school) general use and purpose.

Bequest of Specific Real Estate

I hereby give, devise and bequeath all of the right, title and interest in and to the real estate located at _____ ADDRESS OR DESCRIPTION OF PROPERTY to the Alabama School of Mathematics and Science Foundation, a nonprofit organization located at 1255 Dauphin Street, Mobile, AL 36604, Federal Tax ID #57-0902925, for ASMS (the school) general use and purpose. Please note that the ASMS Foundation reserves the right to refuse gifted property if it is deemed not in the best interest of the Foundation and School.

2. Percentage Bequest

If you are considering making a bequest of a percentage of your estate to the ASMS Foundation, we recommend the following language:

I hereby give, devise and bequeath ____ percent (____%) of my total estate, determined as of the date of my death, to the Alabama School of Mathematics and Science Foundation, a nonprofit organization located at 1255 Dauphin Street, Mobile, AL 36604, Federal Tax ID #57-0902925, for ASMS (the school) general use and purpose.

3. Residual Bequest

I hereby give, devise and bequeath to the Alabama School of Mathematics and Science Foundation, a nonprofit organization located at 1255 Dauphin Street, Mobile, AL 36604, Federal Tax ID #57-0902925, _____ (ALL OR A PERCENTAGE) of the rest, residue and remainder of my estate to be used for ASMS (the school) general use and purpose.

4. Contingent Bequest

If (primary beneficiary) does not survive me, then I hereby give, devise and bequeath to the Alabama School of Mathematics and Science Foundation, a nonprofit organization located at 1255 Dauphin Street, Mobile, AL 36604, Federal Tax ID #57-0902925, _____ (DESCRIPTION OF PROPERTY) to be used for ASMS (the school) general use and purpose.