

## Estate Gift Intention

To support North Kansas City Schools, I/we have completed a planned gift naming the North Kansas City Schools Education Foundation a beneficiary or recipient. The fulfillment of my/our commitment to the Education Foundation, to be used for the benefit of North Kansas City Schools, shall be made as follows:

**Personal Information:** *Please share your personal information so that we may recognize you and provide stewardship for your gift.*

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_

Address: \_\_\_\_\_

Email Addresses: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phones: \_\_\_\_\_

Your Connection to North Kansas City Schools: \_\_\_\_\_

**Type of Instrument:** *Please check or complete all applicable boxes.*

My/Our gift provision is to be made through the following:

Bequest (*Will or Living Trust Agreement*)\*

Life Insurance

NKC Schools Education Foundation named as policy owner.  NKC Schools Education Foundation named as beneficiary only.

Retirement Plan (*Examples: IRA, 401(k)*)

NKC Schools Education Foundation named as account owner.  NKC Schools Education Foundation named as beneficiary only.

Charitable Gift Annuity

Irrevocable Trust (*Example: Charitable Remainder Trust*)

Other: \_\_\_\_\_

*\*Optional: You may wish to attach a copy of the document's first page, signature page and the page including the testamentary gift provision to the NKC Schools Education Foundation.*

**Valuation of Gift:** *Please check or complete all applicable boxes.*

The estimated current value of my/our estate gift intention to the NKC Schools Education Foundation is:

\$ \_\_\_\_\_.

The estimated value of my/our estate gift intention to the NKC Schools Education Foundation is based on the following:

Specific Amount Bequest: \$ \_\_\_\_\_

Percentage Bequest: \_\_\_\_\_ %

Residual or Remainder Bequest: \_\_\_\_\_ %

Contingent Bequest: \$ \_\_\_\_\_ OR \_\_\_\_\_ %

Face Value or Policy or Plan: \$ \_\_\_\_\_

Cash Value or Policy or Plan: \$ \_\_\_\_\_

Full Value of Trust or Annuity: \$ \_\_\_\_\_

(Continued)

## *Estate Gift Intention – Continued*

Name: \_\_\_\_\_

Name: \_\_\_\_\_

### **Gift Purpose:**

My/Our gift may be used for “unrestricted purposes” as determined by the NKC Schools Education Foundation to achieve North Kansas City Schools’ highest priority educational goals.

My/Our gift is designated for the following purpose(s):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I/We wish for the NKC Schools Education Foundation to create an endowment agreement to specify the purposes and terms of my/our gift provision.

### **Donor Acknowledgement:**

**YES**, you may include my/our name(s) in any donor listings.

**YES**, you may share pertinent details of my/our gift provision in North Kansas City Schools and NKC Schools Education Foundation publications and websites.

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***Thank you for helping us plan for the future and provide extraordinary educational experiences for generations to come!***

**North Kansas City Schools Education Foundation**  
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[www.nkcschoolsfoundation.org](http://www.nkcschoolsfoundation.org)