



Legacy Society Enrollment Form

Membership in the Lutheran Educational Assistance Fund Legacy Society is reserved for those who have included LEAF in their will, trust and/or estate plans, have named LEAF as a beneficiary (whole or partial) of an insurance policy or retirement account, and/or have established an endowment fund for the Lutheran Educational Assistance Fund.

Name(s): _____ Date: _____
Please print clearly

All planned giving donors qualify for inclusion and recognition as Members of the LEAF Legacy Society. Inclusion allows LEAF to express continued thanks for your intended gift and it allows your planned gift intention to serve as encouragement to others.

- Yes, you may publish my/our name(s) as a Member of the LEAF Legacy Society. I understand that the dollar amount will not be published.
- Please do not publish my/our name(s) as a Member of the LEAF Legacy Society.

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Email: _____

Date(s) of birth: _____

Signature: _____ Signature: _____

I/we have made provisions for a planned gift to the Lutheran Educational Assistance Fund in my/our estate or financial plan. Checked below are the charitable arrangements I/we have made:

Revocable Charitable Plans:

- Will Bequest
- Revocable Trust Distribution
- Life Insurance Beneficiary
- IRA, Annuity or Retirement Plan Beneficiary Designation
- Other/Describe _____

Irrevocable Charitable Plans:

- Life Insurance Assignment
- Charitable Gift Annuity
- Charitable Remainder Trust
- LEAF Endowment Fund
- Life Estate Reserved
- Donor Advised Fund

Estimated current value of your charitable plan to the Lutheran Educational Assistance Fund is:

Revocable: \$ _____ Irrevocable: \$ _____

Although providing an approximate value of your gift is not required, it helps LEAF plan for the future. All information is kept confidential.

All gifts should be earmarked to:

Lutheran Educational Assistance Fund 707 W. Scidmore St., Clarinda IA 51632. Tax ID #42-1326173

Thank you for your generous and vital support of the Lutheran Educational Assistance Fund.

If you have any questions, please call 712-542-3657 or email clarindaleaf@gmail.com

Christian Gift Planning:

Please contact me about establishing a stewardship plan and enrolling in the Legacy Society. I have provided my name, address, and phone number above.