



HERITAGE SOCIETY

The Heritage Society is the Zeta Tau Alpha Foundation giving society for those who have included the Foundation in their estate plans. We thank you for your generosity. **Please send your completed form to ztafoundation@zetataualpha.org.**

HERITAGE SOCIETY DECLARATION OF INTENT

I HAVE INCLUDED THE ZETA TAU ALPHA FOUNDATION IN MY ESTATE PLAN THROUGH MY:

Check Box:

- Will
- Life Insurance
- Living Trust
- Charitable Gift Annuity
- Retirement Plan or IRA
- Charitable Remainder Trust

Other:

Additional details regarding your gift:

My gift has an estimated value of:

MY GIFT SHOULD BE APPLIED TO:

Check Box:

- General Fund (to be used where it is needed most)
- Breast Cancer Education and Awareness
- Education and Leadership
- General Scholarship
- Named Scholarship (Endowed requires a minimum donation of \$50,000)
- Named Scholarship less than \$50,000 (scholarship will be given out as an award scholarship yearly until the balance runs out).

Zeta Tau Alpha Foundation staff is available to discuss options as you explore choices to benefit the ZTA Foundation and your estate needs.

DONOR INFORMATION

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Executor/Personal Representative name: _____

Is this gift revocable or irrevocable? Revocable Irrevocable

Donor signature: _____ Date: _____

The Foundation would like to thank you publicly for your generosity by listing your name as part of the Heritage Society in our publications, website and other special recognition pieces. We hope you will inspire others to create their legacy through the Foundation. **Please select an option below for how the Foundation may recognize your contribution.**

Check Box:

- I wish to remain anonymous
- You may use my name
- I would love to share my story on why giving to the Foundation is important to me.

The Zeta Tau Alpha Foundation is a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code.

Tax Identification Number: 31-0987111

Address:

Zeta Tau Alpha Foundation, Inc
1036 S. Rangeline Rd
Carmel, IN 46032
(317) 872-0540
ztafoundation@zetataualpha.org

About the Zeta Tau Alpha Foundation

The Zeta Tau Alpha Foundation funds scholarships, educational and leadership development programming, and encourages everyone to Think Pink® with breast cancer education and awareness efforts, including partnerships with Bright Pink®, the NFL and the American Cancer Society®.

Please discuss your planned giving intentions with family, professional financial and legal advisors.

This is not a binding legal document, and the details of your gift will remain confidential.