



Bridge Builder Society members Jessica and Mike Downer, UCLA '77

LEAVING A LEGACY FOR THOSE WHO FOLLOW

The Bridge Builder Society is reserved for Betas and friends who leave a legacy for future generations through their will or estate plans. We hope you join this elite group of supporters who follow the example set by the “old man” who builds a bridge for the young man who will follow after him.

MOST COMMON WAYS TO MAKE A PLANNED GIFT



CHARITABLE BEQUEST – Include language in your will or living trust that leaves cash, securities, property or a percentage of your estate to the Beta Foundation. (See reverse for sample language.)



RETIREMENT PLAN BENEFICIARY – Name the Beta Foundation as a beneficiary of your 401(k), IRA or other retirement plans.



LIFE INSURANCE POLICY – Name the Beta Theta Pi Foundation as the owner and/or beneficiary of a life insurance policy.



“Beta’s focus on integrity and leadership have been integral in my life, and joining the Bridge Builder Society will ensure today’s undergraduates carry the principles and brotherhood of our Fraternity well into the future.”

– Mike Downer, UCLA '77

NEED MORE INFORMATION?

Do you have questions, or is the Beta Foundation already in your will or estate plans? Contact the Foundation staff at 800.800.BETA. The Beta Foundation’s Tax ID # is 80-0296934.



CONFIDENTIAL PLANNED GIFT VERIFICATION FORM

Donor Name _____ Date of Verification _____

School _____ Graduation Year _____

Spouse Name _____ Phone _____

TYPE OF ESTATE GIFT TO THE BETA THETA PI FOUNDATION:

- Bequest through will or trust
- Bequest of retirement plan assets
- Living revocable trust
- Other: _____
- Attached please find a copy of the page or paragraph from the will or trust bequest, beneficiary designation form for life insurance, or retirement plan that describes my gift provision.
- Gift as beneficiary or owner of life insurance
- Charitable remainder trust
- Remainder interest in residence or farm

My gift value is a specific dollar amount of \$_____. Or...

My gift is _____ % of my estate or portion of my estate, and the estimated value of this percentage is \$_____.

Estate Attorney/Advisor Name _____ Phone _____

Describe your estate gift to the Beta Foundation (including any gift terms). _____

Donor's Signature _____

Below is suggested language for CRAFTING A PLANNED GIFT IN YOUR WILL OR ESTATE PLANS

"I give, devise and bequest to the Beta Theta Pi Foundation, 5134 Bonham Road, Oxford, Ohio, 45056, the sum of \$_____ or _____ % percentage of my estate. The Federal Tax Identification Number of the Beta Theta Pi Foundation is 80-0296934."



BENEFITS YOU'LL ENJOY AS A BRIDGE BUILDER SOCIETY MEMBER

- Recognition alongside other BBS members at Beta events and in the Foundation Annual Report.
- Receive the framed Bridge Builder poem (shown left) commemorating your membership.
- Avoid estate tax when your BBS gift is paid to the Beta Foundation.
- Peace of mind knowing your estate plans are well documented and will be carried out as intended.
- Satisfaction in knowing your impact on Beta's young men of principle will last forever!

Please mail this form, along with any relevant documentation that mentions the Beta Theta Pi Foundation as a part of your estate plans, to this address: Beta Theta Pi Foundation; 5134 Bonham Rd; P.O. Box 6277; Oxford, OH, 45056. The Beta Foundation Tax ID number is: 80-0296934.