



Planned Giving Declaration of Intent

The Vanguard Foundation was established in 1992 to help insure Vanguard College Preparatory School's position as the best private school in Central Texas for decades to come. It does this by awarding scholarships, building an endowment fund, and making occasional loans to the school to cover operating costs and special projects.

Please list my/our name(s) as: _____

_____ I/We prefer our commitment to remain anonymous for purpose of recognition.

_____ I/We give permission to list my/our name(s) for recognition purposes only.

I am/We are pleased to include the Vanguard Foundation in the following planned gift provisions:

1. Bequest in my Will Beneficiary of a Trust
 Beneficiary of Life Insurance Policy Beneficiary of IRA/Retirement Asset
 Charitable Remainder Trust Charitable Lead Trust
 Other (briefly describe) _____

2. In the approximate amount of \$ _____, and/or
 Percentage of estate: _____%, (approximate value: \$ _____) and/or
 Residue (approximate value: \$ _____), and/or
 Real or Personal Property (approximate fair market value \$ _____).
Please explain briefly: _____

3. The Vanguard Foundation is named a contingent beneficiary. If so, briefly explain conditions:

4. I have included a copy of the portion of my/our estate documents that names the Vanguard Foundation as a beneficiary and understand this will be kept in a secure and confidential file.

I/We wish to direct my/our support to the following:

5. Unrestricted for use where need is greatest within the Vanguard Foundation.
 For use in the following Vanguard Foundation Program: _____
 I agree that in the event the purpose of the restriction of my gift can no longer be served (as resolved by majority of the opinion of the Vanguard Foundation Board of Directors), the Board of Directors may devote any remaining asset(s) exclusively toward Vanguard Foundation charitable purposes that: 1) Are within the scope of the Vanguard Foundation Mission; 2) Most nearly approximates the original purpose(s) and intent of the gift; and 3) benefits Vanguard Foundation.

Please help us ensure your legacy and intent are honored by providing the following contact information.

6. Will or Trust: Executor(s) or Trustee(s)

Contact Name: _____

Address: _____

Phone: _____ Email: _____

Life Insurance: Policy Owner(s) or Administrator(s)

Contact Name: _____

Address: _____

Phone: _____ Email: _____

Retirement Asset: Asset Manager(s)

Contact Name: _____

Address: _____

Phone: _____ Email: _____

Other Information, Contacts or Relationships you would like for us to know about (family, attorney, etc.):

DONOR INFORMATION

_____/_____/_____
Donor (printed) DOB

Donor Signature Date

_____/_____/_____
Donor (printed) DOB

Donor Signature Date

Primary Mailing Address: _____

Preferred Phone: _____ Email: _____

Please send this form, together with copies of all relevant supporting documents to:

Vanguard Foundation, Attn: Greta Knoll, 2517 Mount Carmel Dr., Waco, TX 76710

For questions contact Mike Raymond, President: (254) 717-7678 or mraymondv@gmail.com

EIN: 74 2644342 Charter #: 01235725

The Vanguard Foundation is a qualified 501 (c) 3 Not-For-Profit Organization. We do not provide legal or tax advice. As with any decision involving your assets, charitable giving and estate planning, we strongly urge you seek the advice of qualified, professional counsel.