

CONFIDENTIAL STATEMENT OF BEQUEST PROVISION

All contributions, including bequests, are vital for advancing the George M. Pullman Educational Foundation’s mission to support the dreams and aspirations of outstanding graduating high school seniors with merit-based, need-based scholarships and continuing educational support as they pursue their bachelor’s degree at the college or university of their choice.

As a demonstration of my/our support for the George M. Pullman Educational Foundation, I am/we are pleased to have made a bequest provision as indicated below:

- Will or revocable trust
- Other type of trust: _____
- IRA or retirement plan beneficiary designation
- Life insurance beneficiary designation
- Other beneficiary designation (e.g., bank account, bond, donor-advised fund): _____

Based on the information available to me/us as of the date hereof, the estimated current value of my/our testamentary gift to the Pullman Educational Foundation is approximately:

\$ _____

Donor

Spouse/Partner

Donor Name(s) (please print): _____

Signature(s): _____

Date: _____

Birth date(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

Email: _____

The Foundation understands that this statement of bequest provision is not a legal or binding commitment and that the amount listed herein is an estimate. You have the right to revise this gift at any time if circumstances change. As a courtesy, the Foundation would appreciate notification of that event. Based on the information provided, your gift will be recognized but the details of this form will remain confidential. As always, please consult your financial, tax, and/or legal advisors to determine the benefits of making a planned gift.

If you would like to be acknowledged as part of the *Munger Planned Giving Society*, please print how you would like to be recognized:

Documenting your bequest allows us to better steward your future gift and personally express our gratitude to you now. It solidifies a lifelong relationship with the Foundation that will ultimately be made permanent by the legacy you leave.

Documentation Checklist

Under the Foundation's reporting standards, certain documentation is required for my/our bequest to be included in fundraising totals. To that end, attached are the following items:

- A copy of the portion of the will or trust document or beneficiary designation form referencing my/our planned gift to the Foundation.
- The document's signature page
- A page indicating the date of the document
- If the bequest is included as part of my and my spouse/partner's estate plan and will not be realized until the death of the survivor, attached are copies of my spouse/partner's documents from the above list.

Please return this form with any related documentation to:

George M. Pullman Educational Foundation
Office of the Executive Director
55 West Monroe Street, Suite 3460
Chicago, IL 60603

Thank you for thoughtfully supporting the Foundation and its future for generations to come!