



DELTA UPSILON

EDUCATIONAL FOUNDATION



The Heritage Circle was established to honor our living brothers and their families who have chosen to support the Delta Upsilon Educational Foundation as a beneficiary in their will or estate plans. Thank you for choosing to join this elite group who will continue to build better men through their legacy gift to the Delta Upsilon Educational Foundation.

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 Delta Upsilon Educational Foundation.



Retirement Plan Beneficiary

Name the Delta Upsilon Educational Foundation as a beneficiary of your 401(k), IRA or other retirement plans.



Life Insurance Policy

Name the Delta Upsilon Educational Foundation as the owner and/or beneficiary of a life insurance policy.

"My late father, Carroll T. Cox, *Illinois '34*, was a season football ticket holder. I remember going to the Illinois chapter for Homecomings with him in the early 60's, when the active chapter dressed in coats and ties for alumni. When I went to Illinois, I rushed a couple other fraternities, but I quickly confirmed DU was the place for me. My life has been immeasurably enriched by the life-long relationships our Brotherhood forged. I attended law school in San Diego and became involved with the San Diego State DU chapter where I have been Secretary of their alumni corporation board for 30 years. I would not have continued to volunteer my time, except that again I found life-long Brotherhood at the SDSU chapter. I firmly believe that Delta Upsilon is an excellent opportunity for young men, and that is why we are happy to contribute to its ongoing success."

- Kim Cox, *Illinois '76*

THE HERITAGE CIRCLE

CONFIDENTIAL PLANNED GIFT VERIFICATION

Donor Name _____ Chapter _____ Grad Year _____
Donor Date of Birth _____ Spouse Name _____
Address _____
City _____ State/Province _____ ZIP/Postal Code _____
Cell _____ Home _____ Email _____
Estate Attorney/Advisor Name _____ Phone _____

Type of Estate Gift to the Delta Upsilon Educational Foundation

- Bequest through will or trust Gift as beneficiary or owner of life insurance policy
 Bequest of retirement plan assets Charitable remainder trust or lead trust
 Living revocable trust Remainder interest in residence or farm
 Other: _____

My gift is a specific dollar amount valued at \$ _____.

Or...

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

Describe your estate gift to the Delta Upsilon Foundation (including any gift terms).

Donor Signature _____ Date _____

____ I/we would like to be named as member(s) of The Heritage Circle and included on the plaque at the International Headquarters and in the DU Quarterly magazine.

____ I/we prefer to remain anonymous.

Below is suggested language for crafting a planned gift in your will or estate plans:

"I give, devise and bequest to the Delta Upsilon Educational Foundation, 8705 Founders Road, Indianapolis, IN 46268, the sum of \$_____ or _____ % percentage of my estate."

We appreciate receiving a copy of any relevant documents mentioning the Delta Upsilon Educational Foundation as part of your estate plans. Please mail this form and all documentation to the Delta Upsilon Educational Foundation; 8705 Founders Road; Indianapolis, IN 46268. Contributions are tax deductible and our Federal Tax ID Number is: 35-1976226.