



We are pleased to welcome you to the ACPA 1924 Circle Membership. This group is open to those who have made a gift to the ACPA Foundation through their estate plan. Please take a moment to fill out the information below for our records. The specifics of your gift will remain confidential.

GETTING TO KNOW YOU

Name(s) as you would like listed in The 1924 Circle Documents:

Email: _____

DOB: _____

Address: _____

Phone: _____

You will receive occasional communication from the ACPA Foundation. We will not sell, rent, or exchange your contact information.

Additional contact information (e.g., executor, advisor, power of attorney, family members):

TYPE OF PLANNED GIFT

___ Will or Trust

___ Retirement Plan (401(k), 403(b), IRA, Keogh)

___ Life Insurance

___ Donor-Advised Fund

___ Charitable Gift Annuity/Charitable Remainder Trust)

___ Other

___ This is a contingent gift, and ACPA will only receive the gift under certain circumstances. Please describe the contingent arrangement.

Estimated Value of Gift: (This information is useful for our long term planning purposes. Disclosure of an estimated amount does not constitute a binding obligation).

\$ _____





This generous gift is;

- A) _____ A specific dollar amount, or
- B) _____ A percentage of the estate

My/Our intention is that:

- This gift is unrestricted to the benefit of ACPA
- This gift should be used for the following purpose:
 - Support conference registrations for ACPA members
 - Support scholarship/research for ACPA
 - Support professional development initiatives of ACPA
 - Other: _____
- This gift will be kept anonymous

Please remember to notify your executor and/or family members of your gift intentions.

To help ensure your intent is fulfilled, please direct gifts to the ACPA Foundation, a Washington, DC non-profit corporation, and attach copies of the relevant section of the legal documents describing your gifts. The ACPA Foundation tax ID number is 52-1892948. The ACPA Foundation encourages you to consult with your legal and financial advisors as you consider your estate plan.

Enclosed is a copy of the relevant section of my will/trust/beneficiary designation

I/We understand this is not a legal or binding commitment. The ACPA Foundation should understand the amount of this future gift may be different than the estimated amount.

Name: _____ Date: _____
Name: _____ Date: _____

Please submit this form by mail or email:

ACPAFoundation@acpa.nche.edu

ACPA
1 Dupont Circle, NW
Suite 450, Office 426
Washington, DC 20036

Note:

The ACPA Foundation cannot render tax or legal advice, and the information requested on this statement of intention is not intended as such. Because of the complexity of estate planning, it is important that you confer with a qualified advisor to assess the legal, financial and tax benefits for your personal situation. We are happy to answer any questions you may have about this material.

