

## NIRSA Foundation Legacy Society Bequest Statement of Intent

*I wish to become a member of The NIRSA Foundation Legacy Society to demonstrate my support for my NIRSA Family. I have made a provision in my estate planning to benefit the NIRSA Foundation and realize the minimum contribution for Legacy Society recognition is \$5,000.*

*My Statement of Intent is non-binding and, may be modified or revoked at any time without notice.*

*However, I recognize that giving written notice to the NIRSA Foundation of any changes will allow the NIRSA Foundation to better project and plan for NIRSA's future. This form and any future notices may be emailed to [foundation@nirsa.org](mailto:foundation@nirsa.org) or mailed to the NIRSA Foundation at 4185 SW Research Way, Corvallis, OR 97333.*

### Considerations when designing your legacy:

- A gift of \$28,000, and NIRSA Foundation Board of Directors approval, is necessary to establish a named endowment.
- Individual gifts of \$5,000 or greater may be named by the Donor, subject to approval from the NIRSA Foundation Board of Directors.
- The NIRSA Foundation will determine the timing and amount of the expenditures.
- The Executive Director is responsible for ensuring that the gift is used for a purpose in most alignment with the Donor's original intention.
- The NIRSA Foundation is unable to accept:
  - Gifts of real or personal property.
  - Any gifts that violate federal, state, or local law, statute, or ordinance
  - Any gifts that contain unreasonable conditions or partial interest in property
  - Any gifts that are made with conditions that state the proceeds will be spent by NIRSA Foundation for the personal benefit of a named individual.
  - Any gifts that could expose the NIRSA Foundation to liability
- To best create your legacy to the NIRSA Family, please contact [Kim Holmes](#), Director of Philanthropy for further discussion.

### Contact Information

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

## Gift Recognition

Please select one of the following:

- ☐ List the following name(s) as a Legacy Society Member(s): \_\_\_\_\_
- ☐ I am honored to be included in the NIRSA Foundation Legacy Society; however, I would prefer to remain anonymous. Please list my gift as from an Anonymous Donor.

## Instrument or Provision

I have made the following deferred gift provisions for the NIRSA Foundation:

- ☐ Bequest      ☐ Retirement Plan policy      ☐ Life Insurance policy
- ☐ Other form of deferred or "planned" gift for the benefit of the NIRSA Foundation.  
If other, please specify: \_\_\_\_\_

## Current Gift Value

Please select one of the following:

- ☐ My estimate of the current value of my gift is \$\_\_\_\_\_. I understand that this estimate is strictly confidential and will not be included in public reports. (A copy of your bequest documentation is helpful for NIRSA Foundation records but is not required.)
- ☐ I would rather not disclose the value of my gift.

## Gift Designation

While the NIRSA Foundation encourages donors to make gifts to the Mission Advancement Fund, donors may designate their gifts to the funds that best promote their passion and legacy. Gifts to established endowments and funds will be governed by all related agreements.

It is my intention to donate to the following fund(s):

### ☐ Mission Advancement Fund

The Mission Advancement Fund, formerly known as the General Fund, is comprised of unrestricted gifts that allow the NIRSA Foundation to address emerging needs-like the NIRSA COVID-19 relief membership fee waiver, NIRSA Equity, Diversity, and Inclusion Climate Study-while continuing to underwrite NIRSA Strategic Initiatives like scholarly research and health & wellbeing.

### ☐ Student Officials Development

This dedicated fund supports the skills and leadership development of student officials through training offered at the high-profile NIRSA National Championship Series tournaments. Students who participate in these trainings strengthen their leadership and conflict resolution skills and give back to their communities on and off the field. Contributions to the student officials development fund support existing NSC student officials development programming and future opportunities for student officials.

## Endowments

- |                                                                 |                                                                      |
|-----------------------------------------------------------------|----------------------------------------------------------------------|
| <input type="checkbox"/> The Holsberry/Thompson Endowment       | <input type="checkbox"/> Philly City 6 Endowment                     |
| <input type="checkbox"/> The William Wasson Endowment           | <input type="checkbox"/> Illinois (IIRSA) Endowment                  |
| <input type="checkbox"/> Max & Sonia Gartenberg Endowment       | <input type="checkbox"/> Region I Endowment                          |
| <input type="checkbox"/> Anthony (Tony) J. Chivetta Endowment   | <input type="checkbox"/> Fletcher/Leonida/Region II Endowment        |
| <input type="checkbox"/> Presidents Endowment                   | <input type="checkbox"/> Region II Excellence Endowment              |
| <input type="checkbox"/> Salado Consortium (Texas) Endowment    | <input type="checkbox"/> Region III Endowment                        |
| <input type="checkbox"/> J. Michael Dunn Endowment              | <input type="checkbox"/> Region IV Endowment                         |
| <input type="checkbox"/> Jennifer de-Vries Endowment            | <input type="checkbox"/> Region V Endowment                          |
| <input type="checkbox"/> Frederick R. Braden Endowment          | <input type="checkbox"/> Region VI Endowment                         |
| <input type="checkbox"/> Founders Endowment                     | <input type="checkbox"/> Suzi Smith Endowment for Health & Wellbeing |
| <input type="checkbox"/> NIRSA Foundation Scholarship Endowment |                                                                      |

## New Opportunities:

No one knows campus recreation like you do, and in establishing your legacy, you may like to create a new opportunity for NIRSA Members. Please contact the NIRSA Foundation Director of Philanthropy (foundation@nirsa.org) to discuss how to turn your legacy into an opportunity for the future of the NIRSA Family.

*If you've chosen to designate your legacy to multiple funds, please specify how you would like your gift divided between them:* \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_