



# PI KAPPA ALPHA FOUNDATION



## Oak Trust Society Statement of Intent

The Pi Kappa Alpha Foundation (Federal Tax ID Number: #62-6039877) is pleased to recognize alumni and friends who have included the Foundation in their estate plans as members of The Oak Trust. In very significant ways, Oak Trust members embrace the mission to educate and empower principled leaders.

To best ensure that the Pi Kappa Alpha Foundation is able to carry out your wishes and so that we may acknowledge your generosity, it is helpful for us to receive any of the following: a copy of the relevant portion(s) of the legal document(s) in which your gift is made, a letter from your legal or financial advisor that describes your gift, or a description of your planned gift below.

*Please provide the following information; these details will be kept confidential:*

I have included the Pi Kappa Alpha Foundation in my will or living trust for:  
 a percentage \_\_\_\_\_  a specified amount \_\_\_\_\_  a residuary amount \_\_\_\_\_

**Sample Bequest Language:** I hereby give, devise and bequeath to Pi Kappa Alpha Foundation (Tax ID 62-6039877), a non-profit, educational corporation located at 8347 West Range Cove, Memphis, TN 38125, the sum of \_\_\_\_\_ (or \_\_\_\_\_% of the rest, residue and remainder of my estate) to be used for the general purposes of the Foundation (or for a particular program of your choosing).

*and/or*

I have established an income-producing gift arrangement for the benefit of the Pi Kappa Alpha Foundation (charitable remainder trust or charitable lead trust)

*and/or*

The Pi Kappa Alpha Foundation is a beneficiary of:  
 an insurance policy  my retirement plans  other (please explain below)

My gift is designated to benefit the following area(s) of the Pi Kappa Alpha Foundation:

The approximate amount of my gift(s) \$ \_\_\_\_\_

### **This gift is from:**

Name \_\_\_\_\_ DOB \_\_\_\_\_

Chapter Designation \_\_\_\_\_ Initiation Year \_\_\_\_\_

Home Address \_\_\_\_\_ City/State/Zip \_\_\_\_\_

Preferred Phone \_\_\_\_\_ Preferred Phone Type \_\_\_\_\_

Preferred Email Address \_\_\_\_\_ Preferred Email Type \_\_\_\_\_

The amount of your gift always remains confidential. The Pi Kappa Alpha Foundation will recognize your membership in the Oak Trust Society in appropriate publications unless otherwise instructed by you.

*Your example may inspire others to give generously as well!*

Preferred Name(s) for Oak Trust Recognition List \_\_\_\_\_  I wish to remain anonymous

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

Please return the completed form or direct any question to:

Muffin Dixon Gray  
Development Operations Officer  
Pi Kappa Alpha Foundation  
8347 West Range Cove • Memphis, TN 38125  
(901) 333-2762 [MGray@pikes.org](mailto:MGray@pikes.org)