



Rheumatology Research Foundation

Advancing Treatment | Finding Cures

The Legacy Society Enrollment

Thank you for choosing to include the Rheumatology Research Foundation in your estate plans and making a lasting impact through your planned giving. When your plans are complete, please fill out and return the form. We would like to thank you and enroll you in our Legacy Society. You will be invited to exclusive webinar events, future events, leadership talks and recognized as a member in the Legacy Society.

SECTION I. DONOR INFORMATION

Donor Name: _____

Address: _____

Phone: _____ ☐ Cell Phone ☐ Work Phone ☐ Home Phone

E-mail: _____

SECTION II. GIFT INFORMATION

Plan Type (Will, Trust, Beneficiary Designation, other). You may enclose a copy if you wish.

I have made the following provision(s) for **The Rheumatology Research Foundation** in my estate plan as follows:

- | | Estimated Amount |
|--|-------------------------|
| ☐ Outright bequest in will or trust: | |
| (a) Specific dollar amount | \$ _____ |
| (b) Percent of Estate (_____ %) | \$ _____ |
| ☐ Conditional bequest or will (<i>please describe conditions</i>) | \$ _____ |
| ☐ As beneficiary of a Life Insurance Policy | \$ _____ |
| ☐ As beneficiary of a Retirement Plan | \$ _____ |
| ☐ Other: (Please describe and enclose any documents) | |

SECTION III. RECOGNITION INFORMATION or MEMORIAL GIVING

We like to acknowledge our Legacy Society members by including their names in publications such as our annual report. Please let us know if you would like to be listed.

- ☐ I authorize the Rheumatology Research Foundation to use my name in donor listings and publications recognizing me as a member of *The Legacy Society*.

My/our name(s) should appear as: _____

- ☐ I would prefer to remain an anonymous member of *The Legacy Society*.

OR

- ☐ I would like my gift to be made in honor/memory of:

- Name as it is to be recognized:

- Your relation to the honoree (spouse, parent friend): _____

If your gift to **The Rheumatology Research Foundation** is for other than the Foundation's general purposes, please describe any restrictions on the back of this form. If you wish for your gift to benefit one of the four funding priorities at the Rheumatology Research Foundation, please contact the Philanthropy Office. We can provide you or your attorney with customized language, ensuring your future gift is used exactly as you intend.

Attachments or letters that further describe the above provision(s) are encouraged. In particular, a copy of the section of your will, trust agreement, or other document containing the provision(s) will be appreciated. In the event of unforeseen circumstances that require any further change in the above estate planning provision(s), I agree to notify **The Rheumatology Research Foundation** of such change.

Date: _____ Signature : _____

Please return completed and signed form to your philanthropy officer via email or mail to:

Rheumatology Research Foundation
ATTN: Office of Philanthropy
3379 Peachtree Road NE, Ste. 700, Atlanta, GA 30326

Thank you for your generous support of the Rheumatology Research Foundation

BEQUESTS

A Bequest is the most popular planned gift; the easiest to make; and costs nothing during a donor's lifetime. A Bequest can be included in a new will, or added to an existing will or living trust through a simple amendment called a codicil — often without the expense of hiring a lawyer.

You may make a bequest or gift through your estate by including a provision in your will or living trust, or by naming Rheumatology Research Foundation (the Foundation) as a beneficiary of a retirement plan or life insurance policy. The amount left to the Foundation can be expressed as a dollar amount or as a percentage of the assets to be given.

The following is intended to help you and your attorney in drafting a bequest that satisfies your interests. As you consult your attorney on the selection of appropriate wording to reflect your own goals and intentions regarding the Rheumatology Research Foundation, be sure our organization's correct legal name appears in all final documents as:

Rheumatology Research Foundation, an Illinois Non-Profit Corporation, currently located at 3379 Peachtree Road NE, Ste. 700, Atlanta, GA 30326 Federal Tax Identification Number: 58-1654301

Sample Bequest Language to Rheumatology Research Foundation (Tax ID: 58-1654301):

"I give, devise and bequeath to Rheumatology Research Foundation, an Illinois Non-Profit Corporation, with a tax identification number of 58-1654301, currently located 3379 Peachtree Road NE, Ste. 700 (c/o Development Office), Atlanta, GA 30326 or its successor organization, (the sum of \$ __/percentage of ____% of my estate), to be used for its general purposes."

Please call us with any questions at (404) 929-4825.

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Please return completed and signed form to:

Rheumatology Research Foundation
ATTN: Office of Philanthropy
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