



NATA FOUNDATION

THE CAMPAIGN FOR RESEARCH AND EDUCATION

CONFIRMATION OF DEFERRED COMMITMENT

In order to qualify your commitment to the Foundation through a deferred gift for campaign documentation purposes, please provide the following information:

NAME(S): _____

1. Document Type

- ☐ Will
- ☐ Insurance Policy
- ☐ Charitable Gift Annuity Contract
- ☐ Estate Note
- ☐ Trust
- ☐ Retirement Plan Beneficiary Designation

Other (specify) : _____

2. When does this commitment occur?

- ☐ My death
- ☐ Death of one spouse or partner (specify)
- ☐ Death of both spouses or partners

3. Please describe the nature of the gift:

- ☐ Percentage of Estate: _____%
- ☐ Specific dollar amount: \$ _____
- ☐ Specific Item(s): _____

4. If your gift is to be restricted in any way, please describe the nature of the restriction:

5. ☐ Attached is a copy of my (our) will/insurance policy/charitable gift annuity contract/estate note/trust/retirement plan designation or other instrument(s) to benefit The Foundation (Optional)

6. ☐ I (we) give the Foundation permission to publicize my (our) name(s) as having made a planned gift commitment to the Foundation (Optional).

7. ☐ I (we) would like to have my (our) name(s) listed as a() member(s) of the Shoe Box Society for Planned Giving. This society honors those that have a deferred commitment to the Foundation (Optional).



The NATA Research and Education Foundation NATA Foundation will accept charitable gifts where there is charitable intent on the part of the donor and the gifts further the mission and goals of the organization. All gifts must be consistent with the ethical values and principles of the Foundation. The acceptance of gifts is subject to the Gift Acceptance policy of the Foundation as approved by the Board of Directors.

For gift crediting purposes, I/we understand that we should notify the Foundation if changes are made to my (our) will/insurance policy/charitable gift annuity contract/estate note/trust/retirement plan designation or other instrument that will affect this provision. This confirmation, in and of itself, is not intended to be binding on my/our estate.

Signature

Date

Date of birth

Signature

Date

Date of birth