



The SAR FOUNDERS CIRCLE
Confidential Data Sheet

The Legacy Society of the SAR



The Founders Circle is a legacy society formed to recognize and thank all who have made estate plans to make a specific bequest to NSSAR/SARF Foundation. Membership is available to individuals who name NSSAR/SARF as a beneficiary in a will, trust agreement, retirement plan, insurance policy, or in a tangible asset. The minimum bequest for membership is \$10,000.

Name: _____ Member # _____ Birthdate: _____

Spouse: _____ Birthdate: _____

Address: _____

City, _____ State _____, Zipcode: _____

Telephone _____ Email _____

Please check the appropriate items below:

- Bequest payable upon my/our death(s) to SARF
- Provision in will of surviving spouse payable to SARF at death
- Life insurance payable to SARF
- Named SARF as beneficiary of retirement plan
- Charitable trust to be established at death, eventually payable to SARF
- Added a codicil to name SARF as a recipient of proceeds
- Other: _____

Estimated value payable to NSSAR/SARF: \$ _____

I would like the gift used for the following purpose(s): _____

Note: Undesignated assets will be added to the Endowment Fund.

Your signature: _____ Date: _____

Please return this form to:
SAR Foundation, Inc.
809 West Main St.
Louisville, KY 40202