



Legacy Society Enrollment Form

Membership in the Lutheran Education Foundation Legacy Society is reserved for those who have included LEF in their will, trust and/or estate plans, have named LEF as a beneficiary (whole or partial) of an insurance policy or retirement account, and/or have established an endowment fund for Lutheran Education Foundation.

Name(s): _____ Date: _____
Please print clearly

All planned giving donors qualify for inclusion and recognition as Members of the LEF Legacy Society. Inclusion allows LEF to express continued thanks for your intended gift and it allows your planned gift intention to serve as encouragement to others.

- Yes, you may publish my/our name(s) as a Member of the LEF Legacy Society. I understand that the dollar amount will not be published.
- Please do not publish my/our name(s) as a Member of the LEF Legacy Society.

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Email: _____

Date(s) of birth: _____

Signature: _____ Signature: _____

- I/we have made provisions for a planned gift to Lutheran Education Foundation in my/our estate or financial plan. Checked below are the charitable arrangements I/we have made:

Revocable Charitable Plans:

- Will Bequest
- Revocable Trust Distribution
- Life Insurance Beneficiary
- IRA, Annuity or Retirement Plan Beneficiary Designation
- Other/Describe _____

Irrevocable Charitable Plans:

- Life Insurance Assignment
- Charitable Gift Annuity
- Charitable Remainder Trust
- LEF Endowment Fund
- Life Estate Reserved
- Donor Advised Fund

Estimated current value of your charitable plan to Lutheran Education Foundation is:

Revocable: \$ _____ Irrevocable: \$ _____

Although providing an approximate value of your gift is not required, it helps LEF plan for the future. All information is kept confidential.

All gifts should be earmarked to:

Lutheran Education Foundation 1100 N 56th Street Lincoln, NE 68504 Tax ID #41-2032088

Thank you for your generous and vital support of Lutheran Education Foundation.

If you have any questions, please contact Lloyd Wagnitz or Scott Ernstmeyer.

402-467-5404

lwagnitz@lincolnlutheran.org

Christian Gift Planning:

- Please contact me about establishing a stewardship plan and enrolling in the Legacy Society. I have provided my name, address, and phone number above.