



Record of Enhanced Legacy Gifts

Enhanced Legacy Gifts include Major Gifts and Estate Planning. Major Gifts are given in the present time and associated with a particular award or scholarship. They are tax-deductible for the donor. Donors also can make a major gift by pledging a certain amount (e.g., \$1,500, \$3,000, \$5,000 or \$10,000) with annual contributions made over a series of years. Estate Planning allows for gifts to be given in the future and are tax-deductible to the estate. Bequests, which are part of Estate Planning, recognize a transfer of property by will or living trust to an individual or a non-profit or charitable organization such as the National Association of Early Childhood Teacher Educators Foundation (NAECTEF). Popular ways for supporters to make a legacy gift to a non-profit organization are make a major gift or to leave a bequest through their will or living.

Reporting a Major Gift or Bequest to NAECTEF

As evidence of my/our desire to provide a legacy of support to the National Association of Early Childhood Teacher Educators Foundation, I/we hereby inform NAECTEF that I/we have made a provision for a gift in my/our estate plan or wish to make a major legacy gift. I/we wish to inform the National Association of Early Childhood Teacher Educators Foundation, for long-term planning purposes only, that as of this date the total value of my/our planned gift is: \$ _____. (If your gift is a percentage of your estate, please indicate the approximate present value of that percentage. If you plan to make annual contributions, e.g. \$1,000, to reach your pledged total, please indicate your annual contribution here: _____.) I/we understand that by stating an amount, I/we or my/our estate is not legally bound by this statement and I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion. (NAECTEF requests notification any time you make changes or adjustments to your gift.) This gift to the National Association of Early Childhood Teacher Educators Foundation—a corporation organized and existing under the Texas Nonprofit Corporation Law (Federal tax identification number: 63-1226702), headquartered at 4223 Shady Bend Drive, Dallas, Dallas County, Texas 75244—is to be used for its general purposes (or circle the Foundation goal that you wish to support: teacher education research, doctoral scholarships, or advocacy).

Signature _____ Date _____

Joint Signature (if joint gift) _____

Name(s) (please print) _____

Address _____

Phone _____

For our records, please return this form to the NAECTEF Treasurer, Frances Rust, University of Pennsylvania—GSE, 3700 Walnut Street--#439, Philadelphia, PA 19104.

(Disclaimer: This form does not substitute for a will or other legal document. For legal advice and information about current tax law, you should consult an attorney who specializes in estate planning.)

Establishing a Named Fund

With a major gift at the Ambassador level of \$10,000 or the Benefactor level of \$5,000, donors can establish a Named Fund (named after the donor or an honoree) with a designated purpose or purposes, e.g., doctoral scholarships, research awards, or advocacy awards. This gift can be made as a single donation or can be pledged through a series of annual contributions, e.g., \$1,000 or \$2,000. Once annual contributions reach the Ambassador or Benefactor level, the Named Fund will be listed on our website and in some publicity materials. A Named Fund at the Ambassador or Benefactor level is not a permanent fund and the annual award or scholarship is only given as long as the donor or others choose to contribute to the fund.

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Thank you for making an investment in this organization's mission. Although the amount of your gift will remain confidential, you will be recognized as a member of the NAECTEF Circles of Giving—Legacy Circle (unless you indicate that you wish to be listed as an anonymous donor) and as a major donor, if your gift equals or exceeds \$1,500. As a Foundation, it is our privilege to help early childhood teacher education reach its fullest potential and to give back to a teacher education community of which we are a part. Financial support from donors like you is absolutely essential for achieving our goals of supporting research and graduate scholarships in early childhood teacher education.