



# Fidelity Society

PLAN TODAY FOR TOMORROW'S GIFT

## CREATING A LEGACY IN PHI MU

Upon Initiation, all Phi Mus take an oath to support our sisterhood through a lifetime of noble womanhood. Each of us also has an opportunity to give back in a way that extends beyond our lifetime.

Members of the Phi Mu Foundation Fidelity Society have made a commitment to support Phi Mu today, tomorrow and into the future. They have made the Foundation a beneficiary of a planned gift through a bequest from a will, life insurance policy, an annuity or a trust.

**Here's how you can become a member of the Fidelity Society:**

- Leave a bequest or gift to Phi Mu Foundation through a provision in a will, estate plan or living trust;
- Make Phi Mu Foundation a beneficiary of your life insurance, IRA and/or retirement assets;
- Document your planned gift with Phi Mu Foundation by contacting the development office at 770-632-2126 or [foundation@phimu.org](mailto:foundation@phimu.org).

# SAMPLE BEQUEST PROVISION

## Unrestricted Gift

“I hereby give, devise and bequeath to Phi Mu Foundation, a Tennessee nonprofit organization, having its headquarters located in Peachtree City, Georgia (the “Foundation”), [the sum of \$\_\_\_\_\_; or \_\_\_\_\_% of my residuary estate; or all of my residuary estate; or the following described property: \_\_\_\_\_ used for the Foundation’s general purposes.

## Gift to a Specific Foundation Fund or Program\*

“I hereby give, devise and bequeath to Phi Mu Foundation, a Tennessee nonprofit organization, having its headquarters located in Peachtree City, Georgia (the “Foundation”), [the sum of \$\_\_\_\_\_; or \_\_\_\_\_% of my residuary estate; or all of my residuary estate; or the following described property: \_\_\_\_\_ used for the Foundation’s [insert name of specific Foundation fund or program].’

*This sample bequest language is offered as a general guide. Because the law varies from state-to-state, donors must consult with an attorney so that correct language is included in the donor’s will or other estate planning documents.*

*\*Please contact Phi Mu Foundation at [foundation@phimu.org](mailto:foundation@phimu.org) or 770-632-2126 for a list of current funds and programs.*