



Confirmation of Deferred Gift Benefiting the Dallas Bar Foundation

This form is intended to assist donors in providing information about deferred gifts established for the benefit of the Dallas Bar Foundation. These include provisions in a will, codicil, trust, life insurance policy, retirement account beneficiary designation, or other deferred gift to support a program or purpose of the Dallas Bar Foundation. By sharing this information, you can help insure that your deferred gift will be used in accordance with your wishes. If you prefer, you can provide this same information in a letter signed by you or your representative. Your information will be maintained in our files and will not be shared without your permission. Thank you for thinking of the Dallas Bar Foundation in such a thoughtful way.

Name(s) and Address (please print or type): _____

Description or wording of bequest/deferred gift (please attach a copy of the document or relevant page(s) thereof):

Donor's designation for use of gift (if any): _____

Good faith estimate of the value of the gift (if you prefer, you may leave this response blank): _____

Date(s) of Birth of Donor(s): _____

Date of Birth of Beneficiary (if the gift comes to the DBF after the life of someone other than a donor(s)): _____

BELO HERITAGE SOCIETY: Your deferred gift entitles you to become a member of the Belo Heritage Society at the Dallas Bar Foundation and have your name listed with other attorneys and friends who have established a similar gift for the Dallas Bar Foundation. You will also be invited to Heritage Society events. Please indicate below how you would like for your name (or names if a couple) to be listed as a member(s) of the Heritage Society or check the box to decline membership:

Name #1 _____ Name #2 _____

No, I/we do not wish to be a member of the Belo Heritage Society.

PERMISSION TO LIST YOUR NAME: In order to promote support for the Dallas Bar Foundation, we request permission to list your name as a member of the Belo Heritage Society in our newsletters and web site. Information regarding the nature or amount of gifts will not be listed.

Yes, you may list my/our name(s) along with other deferred gift donors.

Yes, but list me/us as "Anonymous."

No, please do not list my/our name(s) in Belo Heritage Society publications.

Date

Signature

Date

Signature

THIS IS NOT A BINDING LEGAL DOCUMENT. Your signature simply verifies that you believe this information is correct as of the date you signed this form. The Dallas Bar Foundation recognizes that the value of a deferred gift, as well as the provision creating the gift, may change over time. If possible, please consider notifying us of future changes in your deferred gift plans for the Dallas Bar Foundation.

Please return completed forms, and direct any questions, to:

Executive Director, Dallas Bar Foundation 2101 Ross Avenue, Dallas, Texas 75201

Phone: (214) 220-7487; Fax: (214) 220-7465; Email: ephilipp@dallasbarfoundation.org