



LITERACY RESEARCH ASSOCIATION

Literacy Research Association Non-Binding Estate Plan Declaration

Please note this form is confidential

I, _____, am pleased to make known my current provision for the future benefit of the Literacy Research Association (LRA). I agree to notify LRA of any changes to these plans. I retain the right to change my mind. It is understood that this statement does not obligate me or my estate in any way. I intend to provide future support to LRA as follows:

Wills & Revocable Living Trusts

- LRA is named as a non-contingent beneficiary in my will or revocable living trust.
Please attach first page, signature page, and all of the article that contains the paragraph that benefits LRA from your will or trust. Please feel free to black out the names of other beneficiaries. Check all that apply below:
- I have made a bequest provision for LRA for a specific amount.
- I have made a bequest provision for LRA of specific property or assets, as follows:
- I have made a bequest provision for LRA for a percentage of my estate.
- I have made a bequest provision for LRA of the rest and remainder of my estate. This bequest will come after the life of my spouse/partner and he/she has an identical provision in his/her will (***please attach information above from both wills/trusts***).
- This bequest will come after the life of my child or children.
- LRA is named as a contingent beneficiary in my will if one or more of my heirs do not survive me. (Please note that contingent provisions are not creditable to the campaign).
- I have named LRA a beneficiary of a Charitable Remainder Trust to be established under my will (***please complete information in the Trust section***).

I estimate the current value of my will/trust provisions for LRA to be \$_____.

Retirement Plans/ Beneficiary Designations

- I have named LRA as:
 - Primary Beneficiary (_____%)
 - Contingent Beneficiary (_____%)
 - of my ● IRA ● 401(K) ● Commercial Annuity ● Other

The estimated present value of this provision for LRA is \$

Please attach a copy of confirmation from your retirement account administrator of the beneficiary/ies named for your retirement account. Please feel free to black out the names of other beneficiaries.

**Charitable
Remainder Trusts**

- I have funded a Charitable Remainder Trust naming LRA or one of its related foundations as a remainder beneficiary of ____%. This trust is not held by LRA's designated corporate trustee.
- The estimated present value of this provision for LRA is \$

Please attach a copy of your charitable remainder trust agreement; feel free to black out the names of other charitable remainder beneficiaries.

**For More
Information**

- I have not made provisions for LRA in my estate plans, but I would be interested in receiving information on making a bequest to LRA.
- I would like information about charitable income plans.

PLEASE CHOOSE ONE:

- I give my permission to have my name listed in any fundraising publications with no amounts reported.
- Please do not list my name in any fundraising publications.

Name _____

Spouse's/Partner's Name _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

Date of Birth _____ Spouse's/Partner's Date of Birth _____

Signature(s)

Date

**Please return this
form to:**

Literacy Research Association
251 S.L. White Blvd.
LaGrange, GA 30241
USA
Phone: 1-706-443-1334
Fax: 706-883-8215

VJ Mayor, Executive Director: VJMayor@asginfo.net