



The AKL Education Foundation was created in 1984 as the tax exempt charitable arm of Alpha Kappa Lambda. Its purpose is to financially support the worthy educational and leadership activities of the Fraternity of Alpha Kappa Lambda. Donors can help to ensure the strength and stability of Alpha Kappa Lambda in the future is by providing a gift in their estate plans.

For those wishing to provide for the future of Alpha Kappa Lambda through a bequest to the AKL Education Foundation the process is simple and includes two steps.

- Step One: The appropriate language must be added to the donor's Last Will and Testament.
  - Examples of the language that can be used is outlined below.
- Step Two: A written gift agreement should be created between the donor and the AKL Education Foundation to fully document and honor the donor's intent for how the gift should be used. The AKL Education Foundation can help with this process by drafting an agreement according to the donor's wishes.

Once this process has completed, and a copy of the relevant provisions of their Last Will and Testament has been shared, the donor's generosity will be recognized through membership in the Second Century Society, Alpha Kappa Lambda's distinguished club for those who make a planned gift and honor AKL.

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### **Example Bequest Language**

The following includes examples of suggested bequest language to benefit Alpha Kappa Lambda through the AKL Education Foundation. Each individual situation is unique and, therefore, these examples include only some gift opportunities. Please make sure to work with the AKL Education Foundation to ensure that the donor's intent for how the gift should be used is properly followed.

To request specialized language for a Last Will and Testament or trust without obligation, please contact:

Alpha Kappa Lambda National Headquarters: 317-563-8003 or [info@AKL.org](mailto:info@AKL.org)

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*NOTE: This is sample language. You should always consult your legal advisor before executing any legal document.*

### **Specific Amount- For general purpose**

"I hereby give, devise, and bequeath to the AKL Education Foundation, a nonprofit, Indiana Corporation with its principal office in Carmel, IN, the sum of \$\_\_\_\_\_ (dollars) as an unrestricted gift to be used in the area of greatest need at the time the gift is received."

### **Percentage of Estate- For general purposes**

"I hereby give, devise, and bequeath to the AKL Education Foundation, a nonprofit, Indiana corporation with its principal office in Carmel, IN, %\_\_\_\_\_ (percent) of the rest, residue, and remainder of my estate as an unrestricted gift to be used in the area of greatest need at the time the gift is received."

**Specific Amount- For specific purpose**

"I hereby give, devise, and bequeath to the AKL Education Foundation, a nonprofit, Indiana Corporation with its principal office in Carmel, IN, the sum of \$\_\_\_\_\_ (dollars) to be used for

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It is understood and agreed that should the purpose for which this bequest is instituted cease to exist, then the AKL Education Foundation may devote said bequest for such other uses and purposes as it determines to be in accordance with my original intent in making this gift."

**Percentage of Estate- For specific purposes**

"I hereby give, devise, and bequeath to the AKL Education Foundation, a nonprofit, Indiana corporation with its principal office in Carmel, IN, %\_\_\_\_\_ (percent) of the rest, residue, and remainder of my estate to be used for,

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This fund shall be a permanent endowment. Additional contributions to this fund, whether by gift, bequest, or devise, may be accepted at any time with the approval of the AKL Education Foundation. All distributions from this fund will be described as having been made available by this fund. It shall be known as,

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It is understood and agreed that should the purpose for which this bequest is instituted cease to exist, then the AKL Education Foundation may devote said bequest for such other uses and purposes as it determines to be in accordance with my original intent in making this gift."

**Additional Deferred Giving Options**

Donors can support the AKL Education Foundation as the beneficiary of all or a portion of their IRA, pension, 401(k), or other retirement plans. Provide the AKL Education Foundation with a copy of the beneficiary form naming AKL Education Foundation as the beneficiary.

For more information contact:

Alpha Kappa Lambda National Headquarters:

Phone: 317-563-8003

Email: [info@AKL.org](mailto:info@AKL.org)