



The SAR FOUNDERS CIRCLE
Confidential Data Sheet

The Legacy Society of the SAR



The SAR Founders Circle is a legacy society formed to recognize and thank all who have made estate plans to make a specific bequest to NSSAR or SAR Foundation. Membership is available to individuals who name NSSAR or SARF as a beneficiary in a will, trust agreement, retirement plan, insurance policy, or in a tangible asset. The minimum bequest for membership is \$10,000.

Name: _____ Member # _____ Birthdate: _____

Spouse: _____ Birthdate: _____

Address: _____

City, _____ State _____, Zip Code: _____

Telephone _____ Email _____

Please check the appropriate items below:

- Bequest payable upon my/our death(s) to the NSSAR or SAR Foundation
- Provision in will of surviving spouse payable to NSSAR or SAR Foundation at death
- Life insurance payable to NSSAR or SAR Foundation
- Named NSSAR or SAR Foundation as beneficiary of retirement plan
- Charitable trust to be established at death, eventually payable to the NSSAR or SAR Foundation
- Added a codicil to name the NSSAR or SAR Foundation as a recipient of proceeds
- Other: _____

Estimated value payable to NSSAR/SARF: \$ _____

I would like the gift used for the following purpose(s): _____

Your signature: _____ Date: _____

For membership in the SAR Founders Circle, Please return this form to:

SAR Foundation, Inc.
809 West Main St.
Louisville, KY 40202



Charitable Gift Agreement

This Charitable Gift Agreement is entered into by and between _____
("Donor") and the SAR Foundation, Inc. ("Foundation").

The Donor will contribute a gift of _____ to the Foundation to assist in
the construction and development of the SAR Education Center and Museum.

The Donor pledges to make a contribution of \$ _____ per year
payable over _____ years, with the first gift payable on or before _____.
Payments toward the pledge will be made on or before _____ each year
thereafter.

("Donor")

By: _____

Print Name

Date

SAR FOUNDATION, INC. ("Foundation")

By: _____
Joseph W. Dooley, President, SAR Foundation, Inc.

Date

By: _____
Philip D. Bloyd, Development Manager

Date

By: _____
Foundation Representative

Date

SAR Foundation, Inc.
Pledge Information Follow-Up Form

Please note this document is for internal purposes only and should not replace a pledge commitment form completed by a donor.

Recognition Information

Account to be set up in Donor Perfect under the following name:

Please List this donor as follows for all payments associated with this pledge (if different than above) for purposes of annual report recognition:

(Example: John and Sally Smith are giving through ABC Company which the pledge is listed under in Donor Perfect, but they would prefer to be recognized as Mr. and Mrs. John A. Smith in the annual report. This information will be tied to any payments that come in on this pledge.)

Please list any other applicable information as related to follow up and fulfillment on this pledge:

Pledge Information

Total pledge amount \$ _____ payable over _____ years.

-OR-

Gift will be made in stocks/securities:

Total pledge amount \$ _____

Contact my broker: _____

Brokerage House: _____

Telephone: _____