

## ***Your Legacy Endures through The Margaret Hyde Heritage Society***

Many individuals who have had a lifelong relationship with Chi Omega and for women whom their participation in the Sisterhood has shaped their lives, these friends have chosen to recognize and celebrate their relationship with the Fraternity in the form of a gift to the Foundation within their estate plans. Such a gift is a simultaneous testament to the Fraternity's past and a cornerstone upon which our Fraternity's future will be built. If you would be interested in such a gift, we have provided some language others have used in their estate plans.

### ***Ways to Give***

Here are a few ways in which planned gifts may become Chi Omega legacies:

- Gifts of cash
- Appreciated property or securities
- Life insurance gifts
- Planned or deferred gifts
- Will bequest

To assist you as you plan your estate gift, here are some illustrative bequest examples:

- Bequest a percentage of estate - I devise and bequeath to the Chi Omega Foundation, a charitable institution located in Memphis, Tennessee, \_\_\_\_\_% of my estate. The current estimated value of my estate is \$\_\_\_\_\_.
- Bequest of specific gift amount - I bequeath to the Chi Omega Foundation, a charitable institution located in Memphis, Tennessee, the sum of \$\_\_\_\_\_.
- Bequest of residuary estate - I devise and bequeath to the Chi Omega Foundation, a charitable institution located in Memphis, Tennessee, all the rest, residue and remainder of my estate, both real and personal, wherever located. The current estimated value is this portion of my estate is \$\_\_\_\_\_.

At this time, our minimum endowment to establish a named permanent fund is \$25,000. Over time our minimum endowment level will adjust by the Board of Trustees. Endowed funds support programing areas, greatest need, as well as certain initiating chapters or alumnae chapters.

### ***Documenting your gift***

We ask that you share with us your intent in writing. Documenting your estate gift with Chi Omega Foundation is important for many reasons, primarily because it allows discussion and understanding of your gift's use. Honoring your wish is paramount to us. It is easy to accomplish:

- Send a copy of the will or living trust (or the portion of those documents) which pertains to Chi Omega, along with the signature page;

- Additionally, when bequeathing a percentage or residue of the estate, provide documentation (hard copy or email) of the current estimated amount to be received, signed by you or your legal representative.

We ask that you please keep us informed of any changes in your estate plans. And from time to time in the years ahead, we will check in with you about any plans that may have changed.

### ***Membership in The Margaret Hyde Heritage Society***

With your estate gift commitment, we invite you to become a member of The Margaret Hyde Heritage Society, appropriately named for the first President of our Foundation. The Society's namesake has quite a Chi Omega legacy, and we believe those who give through their estate should be offered a special legacy to be noted just as Margaret left her indelible mark.

Members are recognized in National Fraternity and Foundation publications. As one of our most thoughtful supporters, you will be invited to select special events that bring together committee Chi Omega contributors. As with any donation to Chi Omega, the choice to remain anonymous is yours.

### ***About the Chi Omega Foundation***

The Chi Omega Foundation is a qualified tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code and was established to assist in funding educational programs of Chi Omega. Gifts to the Chi Omega Foundation are tax-deductible to the full extent provided by law.

- Chi Omega Foundation is our legal name.
- Tax identification number is: 31-0936294
- Address: Chi Omega Foundation, 3395 Players Club Parkway Memphis, TN 38125

The Chi Omega Foundation staff are available to discuss options as you explore choices to benefit the Fraternity and your estate needs.

Chi Omega Foundation  
3395 Players Club Parkway  
Memphis, TN 38125  
(901) 748-8600  
[Foundation@ChiOmega.com](mailto:Foundation@ChiOmega.com)