



Confidential Bequest Intention Form

Welcome to the EducationQuest Foundation Legacy Society, which recognizes the generosity of friends who leave a legacy for future Nebraskans seeking college access support and assistance.

Your gift will help EducationQuest fulfill its mission of *increasing access to higher education in Nebraska* into the future by helping to fund free college planning services, need-based scholarship programs, and college access grants for high schools and middle schools.

To indicate your intention to include EducationQuest Foundation in your will or estate plan, or as a charitable beneficiary of your retirement plan, life insurance, or appreciated securities, please complete this form. *The details will remain confidential.*

Name: _____

Date of Birth: _____

Address: _____

City, State, Zip: _____

Email: _____ Phone: _____

For gifts that will take effect after your lifetime, EducationQuest Foundation should be named as:

EducationQuest Foundation
1300 O Street, Lincoln, NE 68508

Tax ID: 31-1777710

Contact us at 800-303-3745 ext. 6618 for sample bequest language you may include in your will.

Section to be completed by EducationQuest Foundation

Received by: _____ Title: _____

Date: _____ Campaign Code: _____ Banner ID: _____ Notes: _____

Additional Information

When planning for a bequest, consider how you would like your gift to be used to benefit EducationQuest Foundation in the future — whether you wish to designate your gift to EducationQuest Foundation's greatest needs, or to a specific program (e.g. College Planning, Scholarships or College Access Grants). Please indicate how you wish your gift to be designated:

By making this gift, you will become a member of the **EducationQuest Foundation Legacy Society**. To recognize your generosity and to inspire others to make similar gifts, we would like to list your name in EducationQuest Foundation publications. *The nature and size of your estate gift will be kept strictly confidential.* Please indicate your preference below:

- I am willing to be listed as a Legacy Society member I prefer to remain anonymous for this gift

Please list name(s) as: _____

Type of Bequest: The following information is helpful to EducationQuest Foundation for planning purposes. Please check all that apply and estimate the value of each gift in today's dollars. If you have named EducationQuest Foundation as a percentage beneficiary, indicate the dollar value of the designated EducationQuest percentage so that we can recognize you for your generosity.

Will: \$ _____ Insurance policy: \$ _____

Retirement plan/IRA: \$ _____ Appreciated Securities: \$ _____

Is this gift to EducationQuest Foundation contingent on another beneficiary surviving you?

- No Yes

Additional Information: _____

Before you sign below, EducationQuest Foundation wishes to assure you that this statement of intention does not constitute a legal obligation and will not be legally binding in any way on you, your heirs or your estate. Further, EducationQuest Foundation understands that the size of your future gift may be significantly different from the amount estimated above.

Signature: _____ Date: _____

For more information or if you have questions, contact EducationQuest Foundation's Office of Planned Giving at 800-303-3745 or plannedgiving@educationquest.org. Our website is www.educationquest.org/plannedgiving.

Please return this completed form to: EducationQuest Foundation, Office of Planned Giving, 1300 O Street, Lincoln, NE 68508.