



## Leave a Legacy

### The Foundation's Legacy Circle for BASD Students and Teachers

The Foundation for the Bethlehem Area School District was established in 1999 to strengthen, enhance and enrich the educational experiences for the students of the Bethlehem Area School District. Our donors are a critical component of our success in making a lasting impact for the teachers and students within the district. By making a planned or deferred gift to The Foundation for the BASD, YOU leave a legacy that ensures continual and growing resources for the Bethlehem Area School District.

We are honored you entrust this living gift to The Foundation for the Bethlehem Area School District. As a planned giving contributor, you may support BASD with an unrestricted gift, stipulate how the gift will be used, or indicate if the gift is to be used for endowment. You may also make the gift in your name or as a tribute to someone you choose.

#### Statement of Intent

By sharing this information, you help ensure that we properly recognize your generosity, plan for future needs, and – most importantly – manage your gift in accordance with your wishes.

Your information will be kept secure and confidential and not shared without your permission. The Foundation for the Bethlehem Area School District has created a name society – *The Foundation's Legacy Circle* – to recognize those who have declared a planned gift and to encourage others to consider this donation option. Only those who give authorization will be listed as a member of Foundation Friends.

To indicate that you have made provisions for a planned or deferred gift, please complete the Statement of Intent form with as much detail as you are able and willing to share. Return your signed form to:

The Foundation for the Bethlehem Area School District  
P.O. Box 646  
Bethlehem, PA 18017



#### Contact Information

Please contact The Foundation for the Bethlehem Area School District if you have any questions. We are happy to discuss our programs and their impact for the students and educators of Bethlehem Area School District to help you in deciding how to direct your gift. We look forward to working with you to achieve your philanthropic vision to benefit this amazing school district.

Julie Bailey  
Executive Director, The Foundation for the BASD  
610-861-0500 ext. 60255  
[jbailey@basdschools.org](mailto:jbailey@basdschools.org)

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# Planning Your Legacy Gift

## The Foundation's Legacy Circle for BASD Students and Teachers

Financial gifts to The Foundation make a difference for current and future Bethlehem Area School District students by providing opportunities which enhance traditional curriculum that are not otherwise possible. It is through the generosity of gifts like yours that our students are supported by The Foundation. Below is a summary of how you can leave a Legacy Gift to support the Bethlehem Area School District.

- Will/Bequest
- Charitable Remainder Trust
- Individual Retirement Account (IRA)
- Life Insurance
- Charitable Gift Annuity

The Foundation for the Bethlehem Area School District, also known as the Bethlehem Area Education Foundation is a registered 501(c)(3) charitable organization with the identification number 23-2896860.

As financial and family circumstances differ widely, it's best to discuss your individual situation and goals with a qualified estate or tax attorney.

### Will/Bequest

Bequest through a will, which specifies how a donor's property will be distributed after his or her death, is the most common type of planned gift. A bequest can indicate a specific dollar amount or asset, or it can assign a certain percentage of the donor's estate to The Foundation for the Bethlehem Area School District.

### Charitable Remainder Trust

A charitable remainder trust allows a donor to donate assets while continuing to receive payments based on those assets.



### Individual Retirement Account (IRA)

IRAs can be used as a charitable tool to start your legacy gift with The Foundation for the Bethlehem Area School District. Donors can name The Foundation for the BASD as the beneficiary of their IRA as a planned giving tool.

### Life Insurance

Gifts of life insurance can help donors make a significant philanthropic impact and may also reduce or eliminate estate and income taxes for heirs. Gifts of life insurance allows you to take care of your family, and at the same time, fulfill your charitable legacy.

### Charitable Gift Annuity

A charitable gift annuity enables donors to contribute assets to The Foundation for the Bethlehem Area School District, receive an income tax charitable deduction, and receive a guaranteed income for life.

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## Statement of Intent – Planned Giving

Name(s)		
Street		Suite/Apt #
City	State	ZIP Code
Home Phone	Mobile Phone	Email

### Your Living Legacy

As a demonstration of my commitment to the mission of The Foundation for the Bethlehem Area School District, I declare my intention to support the students and educators of Bethlehem Area School District through a planned or deferred gift.

My contribution will be:

- |  |   |
|--|---|
| <input type="checkbox"/> Will/Bequest            | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> IRA                     | <input type="checkbox"/> Life Insurance             |
| <input type="checkbox"/> Charitable Gift Annuity | <input type="checkbox"/> Other _____                |

Estimated value as of date below: \_\_\_\_\_

☐ This gift should support all efforts of The Foundation for the Bethlehem Area School District

OR

☐ The designation for this gift is:

\_\_\_\_\_  
\_\_\_\_\_

Please enroll me/us in The Foundation Legacy Circle under the following conditions:

☐ Feel free to publish my/our name(s) among your lists of The Foundation's Legacy Circle members as a motivation for others to leave a future gift to benefit the Bethlehem Area School District (the amount of your gift is not published). List my/our name(s) as the following:

☐ Please list my/our name(s) internally to the school district only (no outside publication)

☐ Do not list my/our name(s) either internally or externally (anonymous gift).

**Signatures** This Statement of Intent is an expression of my present plans and is subject to change.

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Foundation Signature (Executive Director)

\_\_\_\_\_  
Date

Mail this completed form to:  
**The Foundation for the Bethlehem Area School District**  
P.O. Box 646, Bethlehem, PA 18017

This form is revocable and non-binding but indicates my current wishes.