



# THE TEP FOUNDATION, Inc.

## Planned Gift Declaration of Intent

The Ben Massel Alumni Society is our giving society for those who have included the Foundation in their estate plans. Those who gift or include Foundation in one (1) of the following are automatically enrolled. *I plan to included The TEP Foundation, Inc. in my estate plans through my (Please select one or more):*

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Will                  | <input type="checkbox"/> Living Trust                 | <input type="checkbox"/> Retirement or IRA          |
| <input type="checkbox"/> Trust                 | <input type="checkbox"/> Charitable Gift Annuity      | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Charitable Lead Trust | <input type="checkbox"/> Bequest                      | <input type="checkbox"/> Real Estate or Life Deed   |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Art, Jewlery, or other asset | <input type="checkbox"/> Large Cash Gift            |
- Other (Please describe): \_\_\_\_\_

### Confidential Disclosure

Approximate Percentage (%): \_\_\_\_\_ or Dollar Amount (\$): \_\_\_\_\_  
Other contribution (please describe): \_\_\_\_\_

- I/We have included a copy of the portion of my/our estate document that names the The TEP Foundation, Inc, NYS, NFP. as a beneficiary.

Name: \_\_\_\_\_ D/O/B: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_ D/O/B: \_\_\_\_\_

Home Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

I/we wish to direct my/our support to the following:

- Where Foundation need is greatest
- For a specific purpose within the Foundation (please specify): \_\_\_\_\_
- I'm not sure and would like to discuss my designation options with Foundation

Signature: \_\_\_\_\_

Executor's Name: \_\_\_\_\_

Executor's Contact Information: \_\_\_\_\_

Date: \_\_\_\_\_

Please return a signed copy to:

Email a copy:

The TEP Foundation, Inc.  
770 Anderson Ave., 11K  
Cliffside Park, NJ 07010

[President@thetepfoundation.org](mailto:President@thetepfoundation.org)

Completion of this form is notification of intent only and not intended to be legally binding. Please attach a copy of the instrument (or first page, page referencing the gift, and signature page). Please discuss your planned giving intentions with your professional financial and legal advisors. The TEP Foundation, Inc. is a 501(c)(3) tax-exempt nonprofit organization.