

Steps You Can Take in Order to Include a Gift to Wheaton Academy in Your Estate

1 First, you must have a will or trust. Unfortunately, many individuals put this off until it is too late. If you need help in creating a will or trust or in updating your current will or trust, we have a list of qualified lawyers who have indicated a willingness to work with members of our Wheaton Academy family for a reasonable fee (see the attached list if interested). These lawyers receive no compensation or financial benefit from the school for this work and would be working for you only.

2 If you already have a will or trust, adding Wheaton Academy begins by directing your lawyer to add Wheaton Academy as a beneficiary. (See attached form that you can use to inform your lawyer that you wish to add Wheaton Academy to your will or estate.)

3 If you have other questions or would like to discuss the particulars of your situation, please don't hesitate to call Dr. Gene Frost, Executive Director of the Wheaton Academy Foundation at 630-562-7516. He would be happy to try and answer any of your questions or discuss with you your intentions for your estate gift.

4 If you do include Wheaton Academy in your estate plan, we would ask that you let us know by submitting the Legacy Circle membership form. Whether you would like to add your name in our list of Legacy Circle members or wish to remain anonymous, it is still essential for us to have your completed form. It is beneficial and allows us to follow up your gift at the appropriate time.

Thank you in advance for considering including Wheaton Academy in your charitable giving through your estate. Be assured of the impact your gift will have on God's Kingdom for the generations to come prior to Christ's return.



WA *Wheaton Academy*
FOUNDATION

Legacy Circle

Information to My Attorney Regarding My Estate

I, (your name) _____, wish to add Wheaton Academy, 900 Prince Crossing Rd., West Chicago, IL 60185 to my estate will and/or trust.

In providing for Wheaton Academy, I am interested in considering the following:

- A percentage of my estate in the amount of _____ %
- A fixed amount in the amount of \$ _____
- Other direction:

I am interested in discussing the tax benefits of including Wheaton Academy in my estate planning (including a plan that distributes my assets in light of the tax consequences / benefits of such charitable gifting).

Signature: _____

Date: _____