

STEPS YOU CAN TAKE 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 creating a will or trust, or 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 enclosed list if interested). These lawyers receive no compensation or financial benefit from the school for this work.

2

If you have an existing will or trust, begin by directing your lawyer to add Wheaton Academy as a beneficiary. (Use the enclosed form to direct your lawyer of your intention to add Wheaton Academy to your will or estate.)

3

If you have questions, or would like to discuss the particulars of your situation, please do not hesitate to call Dr. Gene Frost, Executive Director of the Wheaton Academy Foundation, at 630-562-7516. Gene would be happy to answer any of your questions or discuss your intentions for an estate gift.

4

If you intend to include Wheaton Academy in your estate plan, we ask that you inform us of your intentions by submitting the Legacy Circle Membership Form. In doing so, your name will be added to our list of Legacy Circle members. If you prefer to remain anonymous, please indicate so on your form. Your completed form is essential and provides the Wheaton Academy Foundation the information necessary to follow up your gift at the appropriate time.

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



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 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 plan (including a plan that distributes my assets in light of the tax consequences/benefits of such charitable gifting).

Signature _____

Date _____