

ESTATE PLANNING INSTRUCTIONS

Please remember Point Foundation as you plan the details of your estate. Point Foundation is the nation's only scholarship fund for students who have faced barriers to higher education due to their sexual orientation, gender identity or gender expression. Make sure that your legacy lives on by investing in the future leaders of our community.

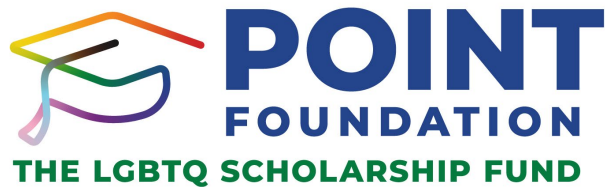
To honor, memorialize, and thank those friends of Point Foundation who have arranged a bequest or planned gift to the Foundation, we have established the Point Legacy Circle. Anyone who notifies Point Foundation that they have named the organization as a beneficiary of a bequest or planned gift will automatically be enrolled as a member.

Members of the Legacy Circle receive certain benefits. These currently include recognition in the Point Foundation annual report (if authorized by you), regular updates and invitations to select Foundation events. This will ensure your generosity endures for generations to come.

For further information about the Legacy Circle, to discuss your specific wishes for your gift, or if you would like assistance in structuring a gift, please contact:

Eddie Peltó
eddie@pointfoundation.org
833-887-6462 ext. 102

Please see the following page for sample language to use when writing your will/trust.



ESTATE PLANNING SAMPLE LANGUAGE

If you would like to leave a gift to Point Foundation:

"I hereby give and bequeath to Point Foundation, a tax-exempt, not-for-profit, charitable institution whose headquarters are located in Los Angeles, CA with federal tax identification number 84-1582086 [the sum of \$ _____ dollars.] or [____% of my residual estate.]"

If leaving a gift of real estate:

"I devise and bequeath to Point Foundation, a tax-exempt, not-for-profit, charitable institution whose headquarters are located in Los Angeles, CA with federal tax identification number 84-1582086 real property located at _____, together with all buildings and improvements located thereon and all insurance policies relating thereto."

If leaving your entire estate:

"I bequeath my entire estate to Point Foundation, a tax-exempt, not-for-profit, charitable institution whose headquarters are located in Los Angeles, CA with federal tax identification number 84-1582086."

If you want to leave a donation to Point Foundation in the event that the party you originally intended the gift for predeceases you (contingent beneficiary):

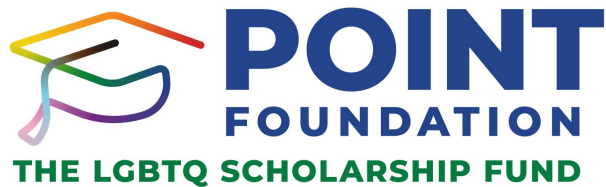
"If any of the foregoing bequests shall lapse, then I bequeath to Point Foundation, a tax-exempt, not-for-profit, charitable institution whose headquarters are located in Los Angeles, CA with federal tax identification number 84-1582086 such bequests as to which an ineffective disposition was made."

If you want to leave parts of your estate to others and the remainder to Point Foundation (residuary legatee):

"All the rest, residue, and remainder of my estate, both real and personal, wherever located, I devise and bequeath to Point Foundation, a tax-exempt, not-for-profit, charitable institution whose headquarters are located in Los Angeles, CA with federal tax identification number 84-1582086."

If you want to leave assets to an individual (such as a partner or child) for use during their lifetime, but direct it to Point Foundation upon their death:

In this case, a more sophisticated vehicle, such as a charitable trust or pour-over trust, may be most effective. Please discuss this with your estate planner.



ESTATE PLANNING SAMPLE LANGUAGE

Sample language prepared for:

I, XXXXXXXXXXXX, wish to endow XXX {Flagship, Community} scholarships in perpetuity at Point Foundation with my bequest of \$XXXXXXXXXXXX.

These endowed scholarships will be used to cover direct financial scholarship expenses, as well as programmatic expenses related to the selection process as well as mentoring and leadership programs delivered by Point Foundation to scholar(s).

My preferences for the awarding of this scholarship are as follows:

- 1) The scholarship shall be named _____Scholarship.
- 2) Awards can go to any eligible LGBTQ student attending a 4-year college or university, graduate school program, or community college.
- 3) There is no geographic or demographic preference.
- 4) There are no restrictions on area of study.

Point will market, solicit, select and execute the _____ Flagship Scholarships and _____Community College Scholarships. Point Foundation will identify a scholar through their standard selections process.



NOTICE OF ESTATE PROVISION

I/we (name/s) _____ hereby notify you that I have included Point Foundation as a beneficiary of my estate plan, by making a provision with the approximate value of _____ (or percentage of residuary) in the following manner:

(e.g., will, IRA beneficiary designation, insurance policy, revocable living trust, remainder trustee, charitable trust, etc.).

This indication of intent does not prevent my amending an otherwise revocable provision that I have made for the organization in the future. I agree to notify Point Foundation of such a rescission.

I hereby give consent to Point Foundation to recognize my commitment to its efforts to provide financial support, mentoring, and leadership training to students who face obstacles due to their sexual orientation and/or gender identity, and/or gender expression. If the value amount of my bequest as indicated above is \$100,000 or more, I will become a member of the Legacy Circle. If I authorize it, my name will be published in the Foundation's annual report, as well as any other appropriate publications. I have checked the box which correspond to the manner of recognition I desire below.

- I consent to be acknowledged in the annual report and other appropriate publications. Please list my (our) names as:

- I prefer to be anonymous.

Signature Donor #1

Date

Signature Donor #1

Date

Please return to: Point Foundation, 6230 Wilshire Blvd, Ste A PMB 890, Los Angeles, CA 90048 or email form to eddie@pointfoundation.org Phone: 833-887-6462, ext. 102