

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 meritorious students who have been marginalized due to sexual orientation or gender identity. 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 Foundation as a beneficiary of a bequest or planned gift of over \$100,000 will automatically be enrolled as a member.

Members of the Point Legacy Circle receive certain benefits. These currently include designation in the Point Foundation annual report (if authorized by you) and invitations to select Foundation events. Benefits can also include a named scholarship (your name or a loved one's name) at a specific institution you select. This will ensure your generosity endures for generations to come.

For further information about the Point 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
212-909-2425

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):

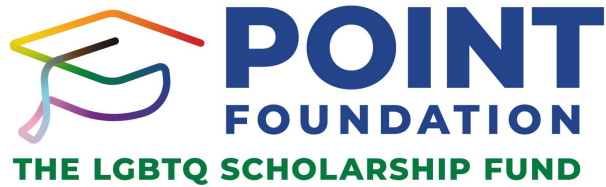
"If any of the foregoing bequests shall lapse, then I bequeath to Point Foundation, a tax-exempt, not-for-profit, charitable institution whose headquarters are located in Los Angeles, CA with federal tax identification number 84-1582086 such bequests as to which an ineffective disposition was made."

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 his or her 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, XXXXXXXXXXXXX, wish to endow XXX Flagship Scholarships in perpetuity at the Point Foundation with my bequest of \$XXXXXXXXXXXXX.

These endowed scholarships will be used to cover direct financial scholarship expenses, as well as programmatic expenses related to the selection, 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.