The National Society of the Sons of Utah Pioneers

Statement of Pledged Bequest for

_____, Donor

Benefitting The National Society of the Sons of Utah Pioneers

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Name _____, Donor
Address_____
_____
_____
_____

This form confirms my expressed intent to make a bequest from my estate to augment *The Legacy Fund* for The National Society of the Sons of Utah Pioneers. I recognize that by signing this statement of pledged bequest I have qualified to be a member in the *Sons of Utah Pioneers Legacy Society,* which is the planned giving recognition Society of the Sons of Utah Pioneers. The following are the specific terms of my bequest arrangement as they stand to date:

_____(Donor) Bequest Commitment: $ _____(approximate value)

or _____ % of his estate

- **Upon fulfillment of the bequest, the Sons of Utah Pioneers agrees to utilize the gift to augment *The Legacy Fund* for the National Society of the Sons of Utah Pioneers.**
- **The SUP agrees to use the Legacy Fund in facility maintenance and improvement, student scholarships, monument construction and maintenance, publications, or other SUP approved projects and programs.**

LEGACY FUND ENDOWMENTS

Should the bequest be made at or above the minimum endowment level of $25,000 the donor may choose to establish The (Name)_____SUP Legacy Endowment.

- **In support of the SUP's greatest needs the SUP agrees to make annual distributions either from the interest generated from the endowment or until the fund is exhausted.**

- **The SUP agrees to use the name of this endowment when reasonably possible in facility maintenance or improvement, student scholarships, monument construction and maintenance, publications or other SUP approved projects or programs.**
- **Good faith effort will be made to clear any press releases with each other (Donor and SUP) prior to any such media releases.**
- **The SUP is hereby authorized to comingle this gift, and any additions thereto, with the consolidated investment funds of the SUP, provided that this fund be credited with its pro-rata share of net investment income in the same manner as other consolidated funds are credited with income.**
- **Should inadequate investment returns from the endowment fund necessitate invasion of the corpus of the fund, the SUP reserves the right to do so.**
- **If, as a result of changed conditions in the future, the income from this endowment shall not be needed for the purposes set forth above, then the SUP is authorized to use the endowment for such purposes as similar as possible to the original intent and which will serve to honor, in an appropriate way, the generosity of the donor.**
- **Should any of the above be violated by either party, or should it be mutually deemed appropriate, the name of the endowment fund may be changed.**

JOINT UNDERSTANDING

While it is the SUP expectations and the donor's intention that this pledged bequest be fulfilled, should unforeseen circumstances require cancellation or modification of these terms, the donor may do so in writing to the National Society of the Sons of Utah Pioneers.

SIGNED:

_____ _____

Donor Date

Acknowledged:

_____ _____

President, The National Society of the Sons of Utah Pioneers Date

Acknowledged:

_____ _____

National Secretary Date

The National Society of the Sons of Utah Pioneers
3301 East Louise Avenue
Salt Lake City, UT 84109