



Plan now >>> Support public education in the future

La Crosse Public Education Foundation (LPEF, Tax ID # 39-1610700) was founded “specifically to raise funds and make grants and engage in projects and programs for the benefit of the public schools and the public school children of the La Crosse School District.” The Foundation:

- Provides support for projects and programs which are consistent with District philosophy, but where insufficient funding is available within the District budget.
- Promotes public understanding of and non-political support for public education.

LPEF accepts and encourages benefactors to make will bequests and living trust provisions designating LPEF, or a specific existing endowed fund, as the beneficiary. Donations must support and/or enhance the mission and purposes of LPEF, and otherwise conform with LPEF’s gift acceptance policy. Other bequests may be accepted upon approval by the Board of Directors.

- If the benefactor provides no specific direction, the LPEF Board will determine the best use for the bequest, including whether to create a new endowed fund, a new board-advised fund, or to use the bequest in support of a current priority.
- LPEF encourages benefactors to provide notification when intending to name LPEF as the beneficiary of will bequests or living trusts. This allows for proper recognition and celebration of the benefactor’s generosity, and allows LPEF to clarify the benefactor’s intent. (See attached Letter of Intent.)

Confer with your legal adviser and ask to designate a specific dollar amount, or a percentage of the residue of the estate, to the La Crosse Public Education Foundation (Tax ID number is 39-1610700), La Crosse, WI.

The following are examples of language for gifts by will, trust, or beneficiary designation:

- **Unrestricted gifts:** "I give _____ to the La Crosse Public Education Foundation, a 501(c)(3) nonprofit organization (Tax ID # 39-1610700) in La Crosse, WI., for the greatest need."
- **Existing fund:** "I give _____ to the La Crosse Public Education Foundation, a 501(c)(3) nonprofit organization (Tax ID # 39-1610700) in La Crosse, WI., for its [Fund Name]."

For a list of existing funds, see: <https://lacrosseeducationfoundation.org/endowment-funds/>

- **Gift to establish a new fund:** If there is not an existing account for the charitable purpose you wish to benefit, please contact us to discuss your gift intentions and receive sample fund agreements.

La Crosse Public Education Foundation
PO Box 1811
La Crosse, WI 54601

Office: (608) 787-0226
Executive Director Nell Saunders-Scott
nell@lacrosseeducationfoundation.org

The La Crosse Public Education Foundation, Inc. (LPEF) was incorporated in 1988 and received status as a 501(c)(3) non-profit organization from the Internal Revenue Service on Feb. 21, 1989.



Planned Gift Letter of Intent

As evidence of my/our desire to provide a legacy of support to public education in La Crosse, I/we hereby inform the La Crosse Public Education Foundation (LPEF; Tax ID # 39-1610700) that a provision for a gift to LPEF has been included in my/our estate plan. I/we understand this commitment is revocable and can be modified at any time. I/we also agree to inform LPEF in writing of future changes in the agreement that may affect LPEF's interest.

Full Legal Name(s) _____ Date(s) of Birth _____

Address _____ City _____ State _____ Zip Code _____

Phone _____ E-Mail Address _____

It is my/our intent to leave a legacy to LPEF through my/our:

- | | |
|---|---|
| <input type="checkbox"/> Will | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Living Trust | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Retirement Plan Assets | <input type="checkbox"/> Other _____ |

ADDED NOTES: _____

I/we wish to inform LPEF, for long-term planning purposes only, that as of this date, the value of the gift is: \$ _____. (If your gift is a percentage of your estate, please indicate the approximate value of that percentage.) I/we understand that, by stating an amount, my/our estate is not legally bound by this statement and I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion. Please designate this gift to benefit the following:

Bequests of \$10,000 or more may be used to create a separate named endowment fund. If this is your desire, please provide the following information:

Name of the fund: _____

Purpose of the fund: _____

Please enroll me/us in the La Crosse Public Education Foundation's *Legacy Society*:

- Feel free to publish my/our name(s) among *Legacy Society* members as a motivation for others to leave a future gift to benefit La Crosse public schools. I/we wish for my/our name to appear as: _____
- Please do not publish my/our name on any roster of benefactors (this is an anonymous gift).

Signature(s) _____ Print name(s) _____ Date _____

Accepted by Nell Saunders-Scott, Executive Director, La Crosse Public Education Foundation _____ Date _____
Email: nell@lacrosseeducationfoundation.org
Phone: (608) 787-0226