



Developing Our Industry's  
Future Leaders

### PTDA Foundation Heritage Society Commitment Form

**PTDA FOUNDATION**  
230 West Monroe Street  
Suite 1410  
Chicago, IL 60606-4703  
USA  
Phone: +1.312.516.2100  
Fax: +1.312.516.2101  
E-mail: [foundation@ptda.org](mailto:foundation@ptda.org)  
[www.ptda.org/HeritageSociety](http://www.ptda.org/HeritageSociety)

I/we have named the PTDA Foundation as a beneficiary of a: *(check as many as apply)*

- Will
- Charitable Trust
- Life Insurance Policy
- Retirement Account
- Mutual Fund
- Other (Please Specify)

Approximate Dollar Amount: *(optional)* \$ \_\_\_\_\_

As a result of notifying the PTDA Foundation of this intended gift, I/we understand that I/we am/are eligible to participate in the *Heritage Society*, PTDA Foundation's honorary recognition for individuals who have named PTDA Foundation in their estate plans.

- Please include me/us as members of the *Heritage Society*.
- I/We prefer to be an anonymous member of the *Heritage Society*.

(Please print your name as you would like it to appear in our recognition materials.)

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City State/Province ZIP/Postal code

\_\_\_\_\_  
Phone Email

Please be assured that the information provided will remain strictly confidential. This document creates no legal obligation, and plans may be changed at your discretion. Please notify our offices of any changes so that our records may be updated. A copy of this form will be sent to you for your records.

\_\_\_\_\_  
Signed Date

\_\_\_\_\_  
Print Name

**Please return this form by e-mail, fax or mail to the PTDA Foundation.** *The PTDA Foundation is a not-for-profit, tax-exempt 501(c)3 corporation whose operations are funded entirely by tax-deductible contributions and program revenues. Your contribution will be tax deductible to the full amount allowed by law. No goods or services were provided in exchange for this contribution.*