



**Kappa Alpha Order  
Educational Foundation**

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***1865  
Trust***



Recognizing the  
generosity and  
foresight of those  
who choose to  
embrace the  
vision of  
KA's future.



# The 1865 Trust Magnolia Leaf

A bequest or  
testamentary trust  
of \$1 million or more  
will secure your name  
to be permanently  
displayed on a bronze  
magnolia leaf at  
Mulberry Hill.



## WHAT IS THE 1865 TRUST?

The *1865 Trust* recognizes the generosity and foresight of those who choose to embrace the vision of KA's future by making a meaningful planned gift to the Kappa Alpha Order Educational Foundation (KAOEF). Your entrance into the ranks of the *1865 Trust* will be a powerful testimony to the charitable expressions of your values, ideals, and commitment to Kappa Alpha Order's future.

Membership in the *1865 Trust* recognizes those who have made provisions for a planned gift of \$10,000 or more to the KAOEF. Most of our alumni in the *1865 Trust* will fulfill their gift through one of the most common and perhaps easiest ways of making a planned gift, by naming the KAOEF in a will, or as a beneficiary of a life insurance policy or an IRA.



In appreciation of your commitment as a member of the *1865 Trust*, you will receive a handsome block in which is etched the insignia of the National Administration Office at Mulberry Hill.

## THE 1865 TRUST REGISTRY

The KAOEF initiated a new tradition to coincide with the 150th anniversary of the founding of Kappa Alpha Order. The *1865 Trust Registry*, unveiled in 2015, is a handsome, archival, leather-bound ledger that serves as a record to be treasured and celebrated. Only members of the *1865 Trust* are invited to add their signatures in the Registry, symbolizing the power of personal philanthropy and perpetuation of our founders' legacy.

Members are invited to sign the *1865 Trust* registry, by personal appointment, at Mulberry Hill in the very room where Robert E. Lee stayed while visiting Lexington and accepting the presidency of Washington College in 1865.

In addition, throughout the year we will offer specific dates and times for members to sign their names in this remarkable ledger. The *1865 Trust Registry* is permanently housed at Mulberry Hill for display. Join today and add your signature to this roll of honor.



## CREATE YOUR LEGACY TODAY

Full Name Birthdate

Address

City State Zip

Phone

Email

*I have included the Kappa Alpha Order Educational Foundation (KAOEF) as beneficiary of my trust or estate plan in the following way:*

**Bequest (Will or Living Trust)**

- Percentage ( \_\_\_\_ % )
- Residual ( \_\_\_\_ % )
- Specific
- Contingency
- Other: \_\_\_\_\_

**Life Insurance Policy**

Policy Face Amount  
\$ \_\_\_\_\_  
Current Case Value  
\$ \_\_\_\_\_  
Type of Policy  
\_\_\_\_\_

**Retirement Plan**

- Percentage ( \_\_\_\_ % )
- Other: \_\_\_\_\_

Policy Number  
\_\_\_\_\_  
Company Name  
\_\_\_\_\_

**Charitable Trust**

- Present size of trust corpus  
\$ \_\_\_\_\_
- KAOEF's percentage of remainder or lead trust \_\_\_\_ %
- Trustee (if other than KAOEF):  
\_\_\_\_\_

Other:  
\_\_\_\_\_

*The estimate value of my gift is \$* \_\_\_\_\_  
*(must be a minimum of \$10,000 for inclusion in the 1865 Trust)*

*I intend for this gift to be used for:*

- Unrestricted to the KAOEF for the greatest need
- Restricted for \_\_\_\_\_  
(scholarships educational programs, internships, etc.)

**Donor Recognition**

- Please include me as a member of the *1865 Trust* with the opportunity to participate in special programs, events, and list my name for recognition.
- I prefer to remain anonymous. Please do not publish my name.

Signature

Date



**Kappa Alpha Order  
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115 Liberty Hall Road  
Post Office Box 1865  
Lexington, Virginia 24450

p: 540-463-1865  
w: [KAOEF.org](http://KAOEF.org)