

# ESTATE DISTRIBUTION INSTRUCTIONS (INDIVIDUAL)



DALLAS SEMINARY  
FOUNDATION

I, \_\_\_\_\_, hereby direct Dallas Seminary Foundation (the Foundation) to distribute any and all amounts received by the Foundation on account of my death, including but not limited to distributions to the Foundation under a will or from a trust, or pursuant to a beneficiary designation for a retirement plan or account, life insurance policy, annuity contract, payable on death account, or transfer on death account, or from any other instrument or source (each a “testamentary disposition”), to one or more Tax-Exempt Organizations (as defined below) in accordance with the instructions set out on the following page(s) of this instrument. I am making one or more testamentary dispositions to the Foundation based on representations expressly made to me by the Foundation through its agents that the Foundation will honor these instructions, and toward that end in making each testamentary disposition, I am acting in detrimental reliance that the Foundation will honor these instructions. I understand and agree as follows:

- (1) Instructions in this instrument may amplify or be more specific than, but may not contradict, the instructions set out in the primary document providing for the relevant testamentary disposition.
- (2) In no event will the Foundation make a distribution to an organization that (a) is not a Tax-Exempt Organization (as defined below) or (b) whose tenets are materially in conflict with any one or more of the following seven essentials of the doctrinal statement of Dallas Theological Seminary:
  - the Trinity
  - the full deity and humanity of Christ
  - the spiritual lostness of the human race
  - the substitutionary atonement and bodily resurrection of Christ
  - salvation by faith alone in Christ alone
  - the physical return of Christ
  - the authority and inerrancy of Scripture.
- (3) Should any organization designated by me fail to qualify as an organization described in each of Section 170(c), Section 170(b)(1)(A), Section 2055(a), and Section 2522(a) of the Internal Revenue Code of 1986, as amended (a “Tax Exempt Organization”), at the time when any assets are to be distributed to it, the Foundation shall instead distribute such assets pro rata to the remaining qualified organizations. Should the tenets of any organization designated by me be determined by the board of directors of the Foundation to be materially in conflict with any one or more of the seven essentials of the doctrinal statement of Dallas Theological Seminary at the time when any assets are to be distributed to it, the Foundation shall instead distribute such assets pro rata to the remaining qualified organizations. If all of the organizations designated by me fail to qualify as Tax-Exempt Organizations or are determined to have tenets materially in conflict with any one or more of the seven essentials of the doctrinal statement of Dallas Theological Seminary at the time when any assets are to be distributed, distributions shall instead be made to such qualifying Tax-Exempt Organizations as the Foundation shall determine in its sole discretion.
- (4) I reserve the right to revoke or modify these instructions by written instrument at any time.
- (5) In case of multiple instructions, the Foundation may rely on the last-dated instructions received by the Foundation during my lifetime.
- (6) I agree and bind my executors, heirs, and assigns to indemnify and hold harmless the Foundation from any loss, liability, damage or costs, including court costs and attorney’s fees, arising out of the Foundation’s distributions made in good faith in accordance with these instructions.

*Dallas Seminary Foundation will honor these instructions to distribute any amount that is received by the FOUNDATION during the donor’s lifetime (unless otherwise instructed) or as a result of the donor’s death, whether by a will, trust, retirement plan, life insurance policy or other instruments, to the tax-exempt organizations you have designated on page two of this form.*

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# ESTATE DISTRIBUTION INSTRUCTIONS CONTINUED

**Estate Distribution Instructions:** I direct that amounts received by the Foundation on account of my death shall be distributed to the following organizations, in the following percentages or amounts:

NAME	ADDRESS/TELEPHONE	PERCENTAGE OR AMOUNT

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

Address \_\_\_\_\_

**Dallas Seminary Foundation acknowledges receipt of these Estate Distribution instructions.**

Signature \_\_\_\_\_ Title \_\_\_\_\_

Printed Name \_\_\_\_\_ Date \_\_\_\_\_