



## PLANNED GIFT INTENTION FORM

### *Honoring their legacy, bringing hope worldwide*

Your decision to include the School Sisters of St. Francis in your estate plan is a generous and lasting expression of your values. By completing this form, you help us to plan for the future and, if you wish, allow us to recognize you in the Covenant Circle. (*This document is not legally binding and may be changed at any time.*)

#### Donor Information

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

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

#### Type of Planned Gift

I/we have included the School Sisters of St. Francis through the following: (check all that apply)

- ☐ Bequest in my/our will or living trust
- ☐ Beneficiary designation (IRA, life insurance, donor-advised fund, bank/brokerage account, etc.)
- ☐ Charitable gift annuity
- ☐ Charitable trust
- ☐ Other (please describe): \_\_\_\_\_

#### Gift Details (Optional)

Estimated value of gift (if known): \$ \_\_\_\_\_

My/our gift is:

- ☐ Unrestricted (greatest needs of the sisters)
- ☐ Restricted (please specify): \_\_\_\_\_

#### Recognition

- ☐ I/we would like to be included as members of the Covenant Circle.

You may list my/our name(s) in the Covenant Circle recognition list.

Please list as: \_\_\_\_\_

- ☐ I/we prefer to remain anonymous.

## Documentation (Optional)

To help with future planning, I/we:

- ☐ Have attached documentation of the gift (e.g., will/trust page, beneficiary form).
- ☐ Prefer not to share documentation at this time.

## Additional Contact/Relationship you may want us to know (family, attorney, etc.)

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

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

Please explain who the above mentioned person is \_\_\_\_\_  
*family, attorney, etc.*

## Affirmation

This statement is an expression of my/our current plans. It is not legally binding and may be modified at any time.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

---

---

Please tell us about yourself/yourselves, why you chose to make this gift, and what this legacy means to you. (Optional)

---

---

---

---

Please let us know your birthday(s) and wedding anniversary.

Name: \_\_\_\_\_ Birth Date: \_\_\_\_\_

Name: \_\_\_\_\_ Birth Date: \_\_\_\_\_

Wedding Anniversary: \_\_\_\_\_