



CONFIDENTIAL INTENTION FORM

Planned Gift Notification—Confidential

Name: _____

Spouse Name: _____

Date of Birth: _____

Spouse Date of Birth: _____

Phone: _____

Email(s): _____

Address: _____

Your Gift Intention

Please provide the following information and attach a copy of the documentation or appropriate language from your will or trust, if available. Please complete all that apply.

I/We have included a bequest for St. Anthony Shrine in my/our will or living trust.

I/We have named St. Anthony Shrine as a beneficiary of an asset:

Retirement Plan

Bank, Investment, or Other Financial Account

Life Insurance Policy

Other: _____

I/We have named St. Anthony Shrine as a revocable / irrevocable (circle one) beneficiary of a charitable remainder trust.

The anticipated value of my/our gift is/will be approximately \$_____ or _____% of my/our estate.

Please provide a general description of the gift provision:

Yes, you may include me/us in listings of planned gift donors.

Please indicate how you would like your name(s) to appear in our Legacy Society listings. (Please note the amount of your intended gift will not be published):

No, please do not include me/us in listings.

Additional Comments: _____

Signature(s):

Date: _____

Date: _____