

Confidential Letter of Intent for Future (Estate) Gift

As evidence of my/our desire to provide a legacy of support to Our Lady of Grace Catholic Church, I/we hereby wish to inform you that I/we have made a provision for Our Lady of Grace in my/our estate plans. I/We understand that this commitment is revocable and can be modified by me/us at any time.

Name(s) _____

Address _____ City _____ State _____ Zip _____

Phone (home) _____ (mobile) _____

E-mail(s) _____

It is my/our intent to leave a legacy for the benefit of the Our Lady of Grace Church or School through my/our:

- Will Retirement Plan, IRA, Annuity Life Insurance Plan
 Trust Charitable Trust/Gift Annuity Other _____

I/We wish to inform Our Lady of Grace Catholic Church, for long-term planning purposes, that as of this date, the value of my/our gift is \$_____. Please confer Confidentiality Statement below. *(If your gift is a percentage of your estate, please indicate the approximate present value of that percentage.)* I/We understand that by stating an amount, my/our estate is not legally bound by this statement. At my/our sole discretion, I/we may choose to add, subtract, or revoke this bequest at any time.

I/We would like this gift: to be unrestricted, or to benefit: _____ .
(please indicate specific purpose or intentions)

- Please enroll me/us in the Our Lady of Grace Heritage Society under the following conditions:
- I/We give permission to publish my/our name(s) among your lists of Heritage Society members as a motivation for others to leave a future gift to benefit Our Lady of Grace.
 - Please prepare a Heritage Society certificate and paver in recognition of my/our gift.
 - I/We wish my/our gift to remain anonymous. Do not list my/our name(s) either internally or externally.

 Date Donor Signature Donor Signature

CONFIDENTIALITY STATEMENT

Any supporting documentation you share with Our Lady of Grace Catholic Church as an attachment to this letter must have "confidential" on file. No amount, values, or details of your disclosure will be made public without explicit written authorization. Please contact Jon Cassady, Director of Advancement, at joncassady@olgparish.org with any questions or for further information.