

# Statement of Bequest Intention



By completing this form, you signify your intention to name \_\_\_\_\_ (parish, school, ministry or diocese) as a beneficiary of your estate. Your beneficiary understands that all bequest provisions are revocable and that any intentions stated here are not binding on you or your estate. We are deeply grateful for your vision and generosity.

I have named \_\_\_\_\_ (parish, school, ministry or diocese) as a beneficiary of: (Check as many as apply)

- My Last Will and Testament
- Charitable or Revocable Trust (Living Trust)
- Retirement Account
- Charitable Gift Annuity
- Life Insurance Policy
- Donor Advised Fund
- A gift of cash, securities, real estate or other tangible assets to establish an endowment (please specify) \_\_\_\_\_

My provision (s) names \_\_\_\_\_ (parish, school, ministry or diocese) as:

- Primary Beneficiary
- Secondary Beneficiary
- Contingent Beneficiary

(Optional) I estimate that the total value of my gift will be \$\_\_\_\_\_.

If/when this gift is received, it is my wish that the organization use my gift for the following purpose:

- General Purposes/Area of Greatest Need
- Other \_\_\_\_\_

I understand that my commitment to leave \_\_\_\_\_ (parish, school, ministry or diocese) a legacy gift through my estate entitles me to special recognition during events and in publications.

- Yes, the Diocese of Kansas City-St. Joseph may publish my name.
- I wish to remain anonymous and request that my name not be published in connection with my bequest intention.

\_\_\_\_\_  
Signature

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

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

\_\_\_\_\_  
Date

To help us honor the intentions set forth above, we would greatly appreciate a copy of your Will or Trust (or appropriate sections thereof) for safekeeping in our confidential files. Thank you.