



## STATEMENT OF INTENT

To benefit St. Francis of Assisi Parish \_\_\_\_\_

\_\_\_\_\_ herewith represent (my, our) intent to create, or the prior creation of, a Planned Gift benefiting (circle one):

St. Francis of Assisi Church

Rosary School

Our gift has provided, or will provide, that the school or church (circle one):

1. Is a beneficiary of my/our will.
2. Is the beneficiary of my/our life insurance policy.
3. Is named as a beneficiary of my/our trust.
4. Is the beneficiary on my/our IRA(s).
5. Is named in a deed.

Other Planned Gift: Please describe \_\_\_\_\_

\_\_\_\_\_ If provision for your gift has not yet been made, when do you expect to execute the documents? \_\_\_\_\_

If you need referral to a professional; legal, insurance, accountant, financial planner, the Legacy Advisory Council can provide you with a list. Also, we would like to provide a form illustrating appropriate language to assure St. Francis of Assisi Church or Rosary School is correctly identified in the instrument documenting your gift.

\_\_\_\_\_  
Initials I/We would like to be members of the Legacy Society and herewith give the pastor permission to recognize our names in the parish to encourage others to give.

\_\_\_\_\_  
Initials I/We would prefer to remain anonymous.

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

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