Planned Gift Statement of Intent

This statement is an expression of my intent to provide for the future of Providence Cristo Rey High School Inc. through a planned or estate gift. The provision(s) made include the following:

\_\_\_\_\_An outright bequest upon the passing of the donor or the passing of the donor and spouse.

\_\_\_\_\_A life insurance policy, in which Providence Cristo Rey High School Inc. is named as beneficiary or owner and beneficiary.

\_\_\_\_\_Retirement assets in which Providence Cristo Rey High School Inc. is named as a beneficiary.

\_\_\_\_\_A trust agreement with income reserved for the donor, spouse, or other income beneficiary.

\_\_\_\_\_Other (please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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The estimated value of my (our) gift is $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Purpose of the planned gift

It is my wish that the gift be used in the following way(s):

\_\_\_\_\_ Our wish is to create the greatest impact by supporting the most compelling needs/opportunities as determined by the Providence Cristo Rey High School President and/or Leadership Team

\_\_\_\_\_Support of the Providence Cristo Rey High School Endowment

\_\_\_\_\_Our wish is to create the following fund (please provide name and purpose of the

fund): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Special Circumstances of my gift include:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Recognition

Providence Cristo Rey High School would appreciate the opportunity to acknowledge your commitment by publicly recognizing your contribution and your place in the St. Mother Theodore Guerin Planned Giving Society. If you prefer to remain anonymous, we will respect your wishes.

\_\_\_\_\_I/We permit Providence Cristo Rey High School to use my/our name(s) in printed lists of planned gifts in newsletters, the annual report, website, and/or a permanent plaque which will be hung in the school building.

\_\_\_\_\_I/We prefer to remain anonymous during our lifetime; however, you may recognize my/our gift after you receive it.

\_\_\_\_\_I/We prefer to remain anonymous both during and after my/our lifetime.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
*Donor Signature Date*

|  |
| --- |
| ***Printed Name:***  |
| *Address:*  |
| *City: State: Zip:*  |
| *Phone (cell): Work: Other:*  |
| *Email:*  |
| *Date of Birth:*  |

*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Spouse’s Signature Date*

|  |
| --- |
| ***Printed Name:***  |
| *Address:*  |
| *City: State: Zip:*  |
| *Phone (cell): Work: Other:*  |
| *Email/s:*  |
| *Date of Birth:*  |

Thank you for your commitment to the future students of Providence Cristo Rey High School and for your investment in supporting them to become the individuals God intended them to be. If you have any questions, please contact Ann Kellison at 317-860-1000 ext 123 or akellison@pcrhs.org

\**Note for couples: We are happy to list you either separately or as a couple, depending on your preference. If you would like to be recognized as a couple, please complete this form accordingly. If you are making separate planned gifts and prefer to be listed individually in all documents and/or publications, please submit separate forms, one in each name.*