



Investing in the future of Catholic Schools

EXPRESSION OF FUTURE GIFT



As evidence of my/our desire to provide a legacy for Saint Athanasius Catholic School, I/we are pleased to confirm that I/we have made a provision for Sant Athanasius Catholic School in my/our estate plan, as described below:

Name Date of Birth Second Name (if joint gift) Date of Birth
Address City State Zip
Preferred Phone Alternate Phone Email

Gift Information:

I/we have made a provision for this gift through a:

Will or Living Trust IRA/Retirement Plan Other
Charitable Remainder Trust Life Insurance

To include your future gift in long-term planning, the estimated value of this gift as of today is approximately... \$ \*

We appreciate any supporting documentation you are willing to share. We understand that the value and type of your gift may change depending upon circumstances, and kindly request notification of such changes as they occur. Any shared documents will be kept confidential.

\*If your gift is a percentage of your estate, or a specific asset, please indicate the approximate current value.

I/We Designate This Gift:

To benefit the following Saint Athanasius Catholic School programs (if multiple designations, indicate percentages):

Saint Athanasius School Education Endowment Fund %
Saint Athanasius School Education Assistance Trust (SEAT) %
Other - Non-Binding Expression of the Use of the Gift:

Additional Donor Instructions:

This statement of a future gift is not a binding commitment, and I/we retain the right to change or revoke this gift at any time with or without notice to Saint Athanasius School.

Donor(s) Signatures Date