

# LEGACY SOCIETY DECLARATION OF INTENT

Membership in the Legacy Society is reserved for individuals who have made a provision for Saint Ann School Foundation in their estate plans.

As an expression of my/our commitment to Saint Ann School Foundation, Inc.

I/we \_\_\_\_\_ have made estate provisions to support the Saint Ann School Foundation, Inc. through:

Will       Charitable Remainder Trust       IRA / Other Retirement Assets

Trust       Charitable Gift Annuity       Life Insurance Policy

Other (please describe) \_\_\_\_\_

In the approximate amount of \$ \_\_\_\_\_ (confidential)

Percentage \_\_\_\_\_ (confidential)

Approximate dollar amount of % \_\_\_\_\_ (confidential)

I/We have included a copy of the portion of my/our estate document that names St. Ann School Foundation, Inc. as a beneficiary. I/We understand that this information will be kept confidential.

I/We give permission to list my/our name(s) as a member(s) of the Legacy Society with the understanding that the amount of my/our arrangement will be strictly Confidential.  
Please enter my/our name(s) as: \_\_\_\_\_

Although Saint Ann School Foundation, Inc. is currently included in my/our estate, I/we do not wish to be a Member of the Legacy Society or listed in any reports.

This Declaration of Intent is an expression of my/our present plans and is subject to change or modification by me/us.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

The undersigned, being a duly authorized officer of Saint Ann School Foundation, Inc. does hereby accept this gift.

\_\_\_\_\_  
Officer's Name

\_\_\_\_\_  
Officer's Signature