

LEGACY GIFT PLAN



FOUNDATION
for the Diocese of Helena

PERSONAL INFORMATION

Name	Birthdate		
Spouse's name (if this is a joint gift)	Birthdate		
Street Address	City	ST	ZIP

DESCRIPTION OF GIFT(S) *please check all that apply:*

- 1) Bequest is coming to the Foundation via: Will/Living Trust IRA Other Retirement Plan Life Insurance Annuity
 POD/TOD Account CRT _____% payout Other (please describe) _____
- 2) The Foundation receives: % of Estate/%Account Specific amount \$ _____ Residual of Estate
 Specific Asset(s) _____
- 3) The Foundation is: primary beneficiary secondary/contingent beneficiary
- 4) The estimated current value of my/our gift is \$ _____
- 5) Does the gift instrument selected above specifically name the: Foundation Diocese of Helena Other
- 6) A copy of the portion of my/our will(s), living trust, beneficiary designation form, or other instrument date ____/____/____ that pertains to the Foundation
Choose one was previously provided will be provided copy is attached
- 7) I would like to discuss my options in order to know how to best answer the questions above. Please contact me to set up a time to discuss.

PURPOSE OF GIFT *please choose one:*

- This gift is to be unrestricted and may be used where the need is greatest, as determined by the bishop.
- This gift is to be used to fund the _____ Endowment.
specific intent ministry/parish/diocese
- I/We wish to specify that this gift be used for the immediate needs of the following specific intent (ministry/parish/diocese): _____
- I/We wish to create an endowment in my/our family's name to benefit the ministry(ies) important to us. Please contact me.

In the event the above mentioned parish/ministry ceases to exist at the time of your death, the Board of Trustees of the Foundation for the Diocese of Helena will designate where the funds will be endowed subject to applicable Montana and Canon law.

DONOR RECOGNITION *please choose one*

In any public announcements and recognition, including Foundation/Diocesan publications and donor honor rolls, I/we wish to:

- Be recognized as _____
- Remain confidential

I/we understand this Legacy Gift form does not constitute a binding contract. The Foundation for the Diocese of Helena acknowledges that the future value of the gift may be significantly different than the currently estimated value. Foundation for the Diocese of Helena and its employees do not provide tax or legal advice. Prospective donors should consult with their legal and financial advisors.

Donor Signature _____ Date _____

Donor Signature _____ Date _____