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A GIFT TO TRINITY HIGH SCHOOL / SAINT JOSEPH JUNIOR HIGH

A practical way to make a planned gift to **Trinity High School / St. Joseph Junior High** is to include the school in your will or revocable trust, or as a beneficiary on your retirement plan or life insurance. If you have already made a provision to include us in your financial planning, please notify us by completing and returning this document. By documenting your bequest intention, the school will have an opportunity to recognize your generous support in your lifetime.

Information provided to signify your bequest intention to the school will remain completely confidential unless you authorize the school to publicize your gift. We understand that all bequest provisions are revocable, and any intentions stated here are not binding on you or your estate.

I have made revocable gift commitments for Trinity/St. Joe's as follows (check all that apply):

- | | |
|--|-----------------------------|
| ☐ Bequest | Approximate value: \$ _____ |
| ☐ Life Insurance Policy | Approximate value: \$ _____ |
| ☐ IRA or other retirement plan | Approximate value: \$ _____ |
| ☐ Other asset | Approximate value: \$ _____ |

RECOGNITION (select one):

- ☐ I/we accept membership into the Pioneer Legacy society (recognition society for donors who have included Trinity High School in their estate plan). Please publish my/our names among your lists of Pioneer Legacy Society members.

Please clearly print the text as it should appear: _____

- ☐ Please do not list my/our name(s) publicly.

Signature

Signature

Date

Date

Name (Please Print)

Name (Please Print)

Estate Representative Contact Name: _____

Phone Number: _____ Role/Relationship: _____

- ☐ I have attached documentation from my will, retirement plan, life insurance policy, or trust.

If your gift is a percentage of your estate, rather than a fixed amount, the school will be happy to use your good faith estimate of the current value based on this percentage. While not required, you may wish to include a copy of the relevant documents.