

Legacy Gift Intention Form

Thank you for sharing your intention to include St. James School in your estate plans.
We invite you to complete this form with as much detail as you feel comfortable sharing.
All information about your gift will remain confidential and does not create a binding obligation.

Name _____ Spouse Name _____

Address _____ City _____ State _____ Zip _____

Phone _____ Email _____

Date of Birth _____ Spouse Date of Birth _____

Commitment

I/we have made a provision to leave a legacy to St. James School through my/our:

❑ Will ❑ Retirement plan or IRA ❑ Living trust ❑ Life insurance policy ❑ Other _____

I/we wish to inform St. James School, for long-term planning purposes only, that the current value of my/our future gift is $ _____, (This amount is kept confidential; if your gift is a percentage of your estate, please indicate the approximate value.) I/we understand that by stating an amount, my/our estate is not legally bound by this statement and I/we may choose to add, subtract or revoke this bequest at any time, at my/our sole discretion.

Gift Recognition *(choose one)*

❑ You may publish my/our names in Dr. Audrey Evans Legacy Society gift recognition lists as a motivation to others to leave a future gift to benefit St. James School

❑ I/we do not want my/our names published.

Additional notes about this gift _____

_____

_____

Date _____ Signature _____

ST. JAMES SCHOOL

Please return your signed form to: St. James School, Attn: Angela McCole, 3217 W. Clearfield Street, Philadelphia, PA 19132
Or by email: amccole@stjamesphila.org