



Regis Legacy Society

Planned Giving Form for the Regis Catholic Schools Foundation



Name _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

Relationship to Regis/St. Patrick's (Alumni, Parent, Friend): _____

TYPE OF GIFT

I/We have included the Regis Catholic Schools Foundation in my/our Will or Trust by:

- ☐ A specific bequest of \$ _____
- ☐ A percentage bequest of _____% with the estimated value of \$ _____
- ☐ A Charitable Trust
Market Value \$ _____ Regis Interest _____% Payout _____%
- ☐ Other (Please describe): _____

I/We have made the Regis Catholic Schools Foundation the beneficiary of:

- ☐ A Life Insurance Policy: Death Benefit \$ _____ Cash Value \$ _____
Regis is (Check one) _____ Primary Beneficiary _____ Secondary Beneficiary
- ☐ A Qualified Retirement Plan (IRA, 401K, 403b, etc.)
Regis interest: _____% Current market value of the plan is \$ _____
Regis is the (Check one) _____ Primary Beneficiary _____ Secondary Beneficiary
- ☐ Other gift (Please describe): _____

PURPOSE OF GIFT

- ☐ Unrestricted ☐ Restricted (please specify your intentions): _____

DOCUMENTATION

- ☐ Yes, I/We will share a copy of the portion of my/our will that applies to the Regis Catholic School Foundation, or the trust of Change of Beneficiary Form in which Regis is named.

Authorization FOR USE OF NAME

- ☐ Yes, I/We authorize Regis and the Regis Catholic Schools Foundation to include my/our name(s) on the membership list of the Regis Society in official publications and on recognition devices. I/We understand that this authorization is limited to the use of my/our name(s) only, and that the type and amount of gift will remain strictly confidential.
- ☐ I/We prefer to remain anonymous

Signature _____ Print Name _____ Date _____

Signature _____ Print Name _____ Date _____

- ☐ I/We have not yet made a planned gift, but would like to talk with someone about the possible options.