



HERITAGE SOCIETY GIFT INTENT FORM

Through membership in the Heritage Society, I/we, _____, wish to make a difference and bring the Gospel message of faith, hope and love to the generations that follow.

I/WE HAVE DESIGNATED A GIFT FOR THE FOLLOWING PURPOSE(S):

- Catholic Charities
- Catholic Education
- Priestly Formation
- Catholic Community Foundation - Unrestricted
- Diocese of Cleveland - Unrestricted
- Parish/City: _____
- Other: _____

THE GIFT PROVISION(S)* IS INCLUDED IN:

- Bequest in Will
- Trust: revocable -or- irrevocable
- IRA or Retirement Plan Beneficiary Designation
- Life Insurance Beneficiary Designation
- Other: _____

** (optional) Attaching copies of the relevant charitable gift provisions of your legal or planning documents helps us better understand your gift.*

THE VALUE OF MY/OUR GIFT IS ESTIMATED TO BE \$ _____ please specify amount

- or check box here:**
- \$50,000 or less
 - \$50,000-\$100,000
 - \$100,000-\$250,000
 - \$250,000-\$500,000
 - \$500,000-\$1,000,000
 - More than \$1,000,000

IF MORE THAN ONE DIOCESAN MINISTRY IS NAMED, PLEASE INDICATE THE AMOUNT OR PERCENTAGE PASSING TO EACH: _____

PLEASE COMPLETE THE FOLLOWING INFORMATION:

Printed Name(s): _____

Signature: _____ Date: _____

Spouse Signature: _____ Date: _____

Address: _____

City: _____ State: _____ Zip: _____

Email: _____ Phone: _____

Executor/Financial Advisor's Name: _____ Phone #: _____

PLEASE INDICATE YOUR PREFERENCE:

- The Catholic Community Foundation may list my/our name(s) with other Heritage Society members in any Catholic Community Foundation publication as follows: _____
- I/we prefer to remain anonymous. Please do not list my/our name(s).

NOTE: This is not a binding legal document; it is merely an indication of my/our intent to assist in diocesan fund planning.

