

Legacy Gift Intention Form

planning your legacy

Lay up for yourselves treasures in heaven, where neither moth nor rust consumes and where thieves do not break in and steal. For where your treasure is, there will your heart be also. (MT 6:20-21)

Thank you for considering a legacy gift through the Catholic Community Foundation of Minnesota (CCF). Your gift is a profound expression of faith, generosity, and hope for future generations. This non-binding Legacy Gift Intention Form allows us to document your charitable intentions, honor your wishes, and ensure we can steward your future gift in accordance with the purposes you envision. All information shared through this form will be kept confidential.

Return completed form to: Catholic Community Foundation, Attn: Lisa Haemmerle, 2610 University Ave W, Suite 500, St. Paul, MN 55114. If you have questions, please call 651-389-0300.

GIFT INFORMATION

I/we are pleased to advise that I/we are entrusting the Catholic Community Foundation of Minnesota (CCF) to steward my/our charitable legacy and have planned a gift through a:

☐ Will ☐ Trust ☐ Retirement plan ☐ Life insurance policy ☐ Other _____

The estimated value of this gift today is \$ _____

☐ I/we have indicated that this gift is unrestricted.

☐ I/we would like this gift directed for the following charitable purpose(s): _____

DONOR INFORMATION

Primary Donor First Name	MI	Last Name	Date of Birth
Secondary Donor First Name	MI	Last Name	Date of Birth

RECOGNITION PREFERENCE - Please Select One

☐ I/we wish to remain anonymous

☐ I/we wish to be listed as part of your Legacy Society and in publications as: _____

KEY CONTACT AFTER MY/OUR LIFETIME

First Name		Last Name		Relationship to Donor(s)	
Address			City	State	Zip Code
Phone	Phone Type ☐ Home ☐ Work ☐ Cell		Email		

ADVISOR INFORMATION (OPTIONAL)

Attorney Name	Firm Name	Phone
Financial Planner Name	Firm Name	Phone

SIGNATURES

I understand that this intention is neither a pledge, nor is it legally binding.

Primary Donor Signature	Date	Secondary Donor Signature	Date
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