

# THE HOLY NAME LEGACY SOCIETY

## GIFT FORM

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Spouse/Partner Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

- Gift in my will or living trust
- Retirement plan or IRA designation
- Bank or brokerage account designation
- Life insurance policy designation
- Donor-advised fund succession plan
- Charitable gift annuity
- Charitable remainder or lead trust
- Real estate or other asset
- I wish to remain anonymous in the listing

Approximate Amount of Gift:

\_\_\_\_\_

Please Recognize My Gift In Honor  
or Memory Of:

\_\_\_\_\_

Restricted to:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

The Holy Name Legacy Society

By making this gift, you become a member of The Holy Name Legacy Society. If you are comfortable sharing supportive documentation of your gift such a copy of a bequest section with dated signature page, please include with this form. The details on this form as well as any additional information you share with us will remain confidential.