



PLANNED GIFT NOTIFICATION

We realize that many parishioners who plan to support The Incarnation Foundation through their estate and/or financial plans prefer to keep their intentions private. However, by letting us know of your plans, we can thank you during your lifetime and confirm that we are able to fulfill your intentions. We deeply appreciate your vision and generosity.

Name _____

Address _____

Preferred Phone _____ E-mail _____

This document signifies my/our intention to make a bequest through my/our estate plan in the form of:

(Will, Trust, Life Insurance Policy, Retirement Plan Assets, Bank/Investment Account, Other)

We will contact you to discuss additional information such as assets to be donated and how the gift is to be used.

Signature of Donor(s)

Date

Signature of Donor(s)

Date

RECOGNITION

Planned Gift donors will be recognized as members of *The Bishop Garrett Society*.

_____ I/we wish my/our gift to remain anonymous.

We understand that all bequest provisions are revocable and that any intentions stated here are not binding on you or your estate. All information shared with us is kept strictly confidential.

As with any decision involving your assets, we urge you to seek the advice of your professional counsel when considering a gift to The Incarnation Foundation and/or Church of the Incarnation.

Please return this form to:

Jill Stephenson, Executive Director of Stewardship at giving@incarnation.org