



# ST. MARY ACADEMY - BAY VIEW

## Planned Giving Intention Form

As an expression of my commitment to the mission of St. Mary Academy - Bay View, I have included St. Mary Academy - Bay View in the following estate provisions:

- Will Trust
- Charitable Gift Annuity
- Charitable Remainder Trust
- Life Insurance Policy
- IRA/Other Retirement Assets
- Pooled Income Fund
- Other/Additional Details: \_\_\_\_\_
- I have included a copy of the portion of my estate document that names the St. Mary Academy - Bay View as a beneficiary. I understand that it will be kept in a confidential file.
- Membership in the Legacy Society is reserved for individuals who have made a provision for St. Mary Academy - Bay View in their estate plans. I give permission to list my name as a member of the Legacy Society (for recognition purposes only) with the understanding that the amount of my arrangement is strictly confidential.

Please list my name on the Legacy Society honor roll as follows: \_\_\_\_\_

- Although St. Mary Academy - Bay View is currently included in my estate, I do not wish to be a member of the Legacy Society or listed in the honor roll.

### I wish to direct my support to the following:

- Where St. Mary Academy - Bay View needs are greatest
- Other: \_\_\_\_\_

Though this intent form is an expression of my current plans, I understand that it is not a legal obligation and is non-binding. I may modify or revoke these plans at any time.

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

PLEASE PRINT

Name(s): \_\_\_\_\_ Alumnae Class Of (if applicable); \_\_\_\_\_

Mailing Address: \_\_\_\_\_

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

**Please return completed form to: Office of Advancement  
St. Mary Academy - Bay View 3070 Pawtucket Avenue Riverside, RI 02915-5197  
Questions? Call Erin Hanna at 401.434.0113 x 104.**