



Notice of Planned Gift

Donor Information

Name (printed): _____

Address: _____

Email: _____

Phone: _____

Planned Gift

It is my intention to help provide for the current and future students of Jesuit High School through a planned gift to the Jesuit High School Foundation. It is my intent to give a planned gift through:

- ☐ Bequest through will/trust:
- ☐ Percentage of estate: _____
 - ☐ Specific amount: _____
- ☐ Charitable Trust (*select one*)
- ☐ Unitrust
 - ☐ Annuity Trust
 - ☐ Revocable Trust
 - ☐ Lead Trust
- ☐ Charitable Gift Annuity
- Please describe:* _____
- ☐ Life Insurance Policy
- Please describe:* _____
- ☐ IRA or Retirement Plan
- Please describe:* _____
- ☐ Other
- Please describe:* _____

Purpose of Planned Gift

- ☐ This gift is to be unrestricted and may be used where the need is greatest.
- ☐ I/We wish to specify that this gift be used for the following purpose(s):

Fr. William Hayes, S.J. Legacy Club

Jesuit High School would like to extend an invitation to those who have included the Jesuit High School Foundation in their will or living trust to join the *Fr. William Hayes, S.J. Legacy Club* in gratitude for your thoughtfulness.

- ☐ Yes, please include me as a member.
- ☐ Yes, please include me as a member, but I wish to remain anonymous while living.
- ☐ No, I would not like to be included as a member.

Public Recognition Permission

Jesuit High School requests your permission to include your name on the list of planned gift donors, including any publications and public signage such as the Gratitude Report and Donor Wall.

- ☐ Yes, I give Jesuit High School permission to include my name.
- ☐ No, I do not give Jesuit High School permission to include my name.

If you have given permission to include your name, please indicate how you would like to be listed: _____

Notice of Intent

This notice is an expression of my current plans. I understand that I may modify or revoke it and that it is not a legal obligation binding on me or my estate.

Signature: _____ Date: _____

Thank you for including the Jesuit High School Foundation in your estate planning. Please notify us when you have finalized your estate to include Jesuit High School.

To learn more about your giving options, contact the Development Office at 503-292-2663 or development@jesuitportland.org.