

CONFIDENTIAL INTENTION FORM



Dear Donor,

We realize that many people who plan to support Ursuline Academy 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 life, and confirm that we are able to fulfill your stated intentions.

Please know that completing this form is non-binding — we understand that you may change your plans at any time. Please also know that all information you share with us is kept strictly confidential.

Joe Ziska
Chief Advancement Officer
Ursuline Academy
Phone: 781-493-7711
Email: jziska@ursulineacademy.net

Planned Gift Notification- Confidential

Personal Information

Name: _____

Spouse Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Date(s) of Birth: _____

Your Gift Intention

Please provide the following information and attach a copy of the documentation or appropriate language from your will or trust, if available. Please complete all that apply.

- I/We want to support the mission of Ursuline Academy through a planned gift as described below:
- I/We have included a bequest for Ursuline in my/our will or living trust.
 - I/We have named Ursuline as a beneficiary of an asset:
 - Retirement Plan
 - Bank, Investment, or Other Financial Account
 - Life Insurance Policy
 - Other: _____
 - I/We have named Ursuline as a revocable/irrevocable (*circle one*) beneficiary of a charitable remainder trust.

The anticipated value of my/our gift is/will be approximately \$ _____ or _____ % of my/our estate. *(If possible, please include a copy of the bequest language or other wording describing your planned gift.)*

Please provide a general description of the gift provision (*such as, asset to be donated if other than cash or securities, how gift is to be used, whether gift is to create an endowment, etc.*):

Signature(s):

Date:

Return form to:
Joe Ziska
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Ursuline Academy
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Dedham, MA 02026-4299
Phone: 781-493-7711
Email: jziska@ursulineacademy.net