



CHRIST SCHOOL

CONFIDENTIAL PLANNED GIFT CONFIRMATION

Name: _____

Spouse: _____

Street Address: _____

City

State

Zip Code

Date of Birth: ____/____/____

Date of Birth: ____/____/____

Phone: _____

Email: _____

I HAVE INCLUDED CHRIST SCHOOL IN MY ESTATE PLAN AS FOLLOWS:

Type of Provision:

Estimated Amount:

A. Bequest in Will or Living Trust \$ _____

B. Life Insurance Policy Beneficiary
Policy Type: ☐ Term ☐ Whole Life \$ _____

C. Beneficiary Designation in My / Our Retirement Plan/IRA/401k \$ _____

D. (1) Life Income Plan:
☐ Charitable Remainder Trust ☐ Charitable Gift Annuity ☐ Charitable Lead Trust

(2) Payout Rate Percentage: _____

(3) Date of Birth of Income Beneficiary: ____/____/____ \$ _____

E. Donor Advised Fund at a Community Foundation \$ _____

F. Certificate of Deposit-Payable on Death (POD) to Christ School \$ _____

G. Other Method - (Please describe)

We welcome any attachments or excerpts from your estate plan which further describe the nature of your gift to Christ School.

If you have a specific purpose or program to which you want your gift designated, please describe as follows:

If the purpose described no longer exists and cannot be supported with your gift, may we use your gift for another useful purpose determined by Christ School? ☐ YES ☐ NO

If not and you have another purpose in which your gift should be used, please describe it here:

May we publish your name(s) in order to honor you and to further encourage others to participate in support of Christ School? ☐ YES ☐ NO

Signature: _____ Date: ____/____/____

Thank you for your support of Christ School. By giving to the school, you enhance the ability of Christ School to educate young men for generations.