



# Marian Legacy Society

## *Estate Planning Form*

*The information in this form is considered highly confidential by the Advancement Office at St. Mary's Academy. The information provided will only be used to ensure any legacy gifts are administered as directed by the donor.*

**Name(s):** \_\_\_\_\_

**Address:** \_\_\_\_\_

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

***Type of Provision:***

I/We have made provision for St. Mary's Academy in my/our estate planning as follows:

Bequest     Life Insurance     Other (Please describe) \_\_\_\_\_

***Please direct the gift as follows:***

Mother Mary Rose Bursary Fund  
 Specific Named Bursary: \_\_\_\_\_  
 Other: \_\_\_\_\_

***Recognition:***

Include me/us as a member of the Marian Legacy Society at St. Mary's Academy.  
 I/We would like to remain anonymous. Please do not list my/our names as part of the Marian Legacy Society.

*This statement is an expression of my/our current plans and may be revoked. This statement is not legally binding on my/our estate. The information is solely for the Academy to use to ensure the gift is properly administered at such time as a gift arrives.*

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

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