



Planned Giving Intention Form

To share my/our wish to support the Catholic Foundation of Northwest Pennsylvania, I/we are pleased to inform you that I/we have made provision for a gift in my/our estate plans. I/we understand that this commitment can be changed by me/us at any time.

It is my/our intent to leave a legacy gift to [endowment name] through my/our:

____ Will ____ Living Trust ____ Retirement Plan Assets

____ Charitable Remainder Trust ____ Life Insurance Policy ____ Other

I/we wish to inform you for planning purposes that, as of this date, the estimated value of my/our gift is:

\$ _____ Or _____ % of my/our estate

I/we understand that, by stating an amount, my/our estate is not legally bound by this statement and i/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion. Catholic Foundation of Northwest Pennsylvania kindly requests notification any time you make changes or adjustments to your gift.

This gift is made in honor or memory of:

This gift is to be added to an already existing endowment. The name of this endowment is: _____

This gift is to be used to create a new endowment. (A minimum of \$10,000 is required to establish an endowment. Foundation staff will contact you to discuss your plans.)

Donor Signature _____ Date _____

Donor Signature _____ Date _____

Donor Name(s) _____

Donor Address _____

Donor Phone Number _____ Donor Email _____