



Heritage Circle Intent Form

Name(s) _____ Class Year _____ Parent Year _____

Address _____

Date(s) of Birth _____ Phone () _____

In the event you are unreachable, who should we contact?

Name: _____ Phone () _____

I have made a provision(s) for Saint Michael's College in my estate plan as follows:

- Outright bequest in my will \$ _____
- Life insurance policy \$ _____
- Revocable living trust with Saint Michael's as the beneficiary \$ _____
- Life income plan (Charitable Trust, Charitable Gift Annuity) \$ _____
- Retirement plan (pension, IRA, Keogh, ROTH) \$ _____
- Other _____ \$ _____

My gift will be: ___ unrestricted ___ restricted for: _____

Please include with this form related documents (i.e. copy of your will, insurance beneficiary forms, trust agreement, etc.) which further describes the nature of the above provision(s).

_____ Check here if you wish your gift to be anonymous

Please indicate below how you would like your name(s) to appear for recognition purposes:

In the event of a change to these estate plans, I will notify Saint Michael's College.

Date _____ Signature _____

Date _____ Signature _____