



# SAINT MICHAEL'S COLLEGE FOUNDED 1904

## Heritage Circle Membership Information

Name(s) \_\_\_\_\_ Class Year(s) \_\_\_\_\_ Parent Year(s) \_\_\_\_\_  
Address \_\_\_\_\_

Date(s) of Birth \_\_\_\_\_ Phone ( ) \_\_\_\_\_

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

- Outright bequest in will \$ \_\_\_\_\_
- Stocks and/or Bonds \$ \_\_\_\_\_
- 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) \$ \_\_\_\_\_

My/Our gift will be: \_\_\_\_\_ unrestricted \_\_\_\_\_ restricted for: \_\_\_\_\_

*In order to ensure that Saint Michael's College properly documents and acknowledges your commitment, please attach information (i.e. copy of your will, insurance beneficiary forms, trust agreement, etc.) which further describes the nature of the above provision(s).*

\_\_\_\_\_ Please check here if 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 in these estate plan arrangements, I/We will notify Saint Michael's College.*

Date \_\_\_\_\_ Signature \_\_\_\_\_

Date \_\_\_\_\_ Signature \_\_\_\_\_

*The Heritage Circle was established by the Board of Trustees so that we can recognize generous individuals such as yourself, who have taken steps to include Saint Michael's College in your estate plans. We are pleased to welcome you into this prestigious circle of friends.*