



**ESTATE GIFT CONFIRMATION**

If you have made provisions in your estate for a gift to Marist High School, please take a moment to complete the form below and return it to us. If you are comfortable sharing documentation of your estate gift, please include such documentation with this form to enable us to more effectively steward your gift. The details on this form as well as any additional information you share with us will remain confidential.

Name \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

I/We have named Marist High School as a beneficiary in one or more:

\_\_\_ Will      \_\_\_ IRA, pension, or other retirement account      \_\_\_ Lead Trust

\_\_\_ Charitable Remainder Trust (Trustee is not Marist High School)      \_\_\_ Revocable or Living Trust

\_\_\_ Other (please specify): \_\_\_\_\_

Approximate current value: \_\_\_\_\_

Gift designation (if any): \_\_\_\_\_

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

***This document does not bind you or your estate. You may choose to increase, decrease, or revoke this bequest at any time, at your sole discretion.***

**WELCOME TO THE MARIST LEGACY SOCIETY**

The Legacy Society is a valued circle of charitably-minded individuals who have included the high school in their estate plans. Their enlightened generosity is helping to make a Marist education possible for future generations of students. By completing this form, you will automatically be enrolled in the Legacy Society.

*Do you give Marist permission to list your name(s) as a member(s) of the Society on the Marist website, donor report, and other pertinent acknowledgements?*      YES \_\_\_\_\_      NO \_\_\_\_\_

**CONFIDENTIAL STATEMENT**