St. Paul's Monastery
The Sisters of St. Benedict
Legacy Society

Confidential Letter of Intent for Future (Estate) Gift

As evidence of my/our desire to provide a legacy to support St. Paul's Monastery, I/we hereby wish to inform you that I/we have made a provision for St. Paul's Monastery in my/our estate plans. I/we understand that this commitment is revocable and can be modified by me/us at any time.

Name: _____

Address: _____

City: _____ State: _____Zip: _____

Phone (home): _____ E-mail: _____

It is my/our intention to leave a legacy for the benefit of St. Paul's Monastery or their ministries through my/our:

☐ Will ☐ Retirement Plan, IRA, Annuity ☐ Life Insurance Policy

☐ Trust ☐ Charitable Trust/Gift Annuity ☐ Other: _____

I/we wish to inform St. Paul's Monastery, for long-term planning purposes, that as of this date, the value of my/our gift is $_____.* Please confer Confidentiality Statement below. (*If your gift is a percentage of your estate, please indicate the approximate present value of that percentage.)* I/we understand that, by stating an amount, my/our estate is not legally bound by this statement. At my/our sole discretion, I/we may choose to add, subtract, or revoke this bequest at any time.

I/we would like this gift: ☐ to be unrestricted, or ☐ to benefit: (please indicate specific purpose intention)

Please enroll me/us in St. Paul's Monastery Legacy Society under the following conditions:

☐ I/we give permission to publish my/our name(s) among you lists of Legacy Society members as a motivation for others to leave a future gift to benefit St. Paul's Monastery.

☐ Please prepare a Legacy Society certificate in recognition of my/our gift.

☐ I/we wish our gift to be anonymous. Do not list my/our name(s) either internally or externally.

_____ _____ _____

Date Donor Signature Donor Signature

CONFIDENTIALITY STATEMENT

It would be helpful for the Monastery's future planning if it had confidentially on file any supporting documentation you could share as an attachment to you letter. No amounts, values of your disclosure will be made public without explicit written authorization. Please contact James Fennell, Director of Development with any questions or for further information, 651-209-9022, E-mail: jfennell@stpaulsmonastery.org.

Please return this form to: St. Paul's Monastery, Attn: Development Office, 2675 Benet Road, St. Paul, MN 55109.