



## OUR LADY OF SORROWS

Faith + Knowledge + Community

### CONFIDENTIAL MEMBERSHIP FORM

Welcome to the Sorrows Saints Legacy Society. The Sorrows Saints Legacy Society recognizes all those who have included Our Lady of Sorrows Catholic School in their long-term plans through a bequest provision in their Will or trust, a life-income gift, or other deferred gift through **The Monsignor Beahan Education Endowment Fund**.

Name \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Name \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_

- I/We have included Our Lady of Sorrows Catholic School in my/our will.
  - A specific bequest of \$ \_\_\_\_\_
  - A percentage bequest of \_\_\_\_\_%. Estimated value \$ \_\_\_\_\_
  - Other (describe)  
\_\_\_\_\_
  
- I/We have made arrangements for the following:
  - A life insurance policy  
Death Benefit \$ \_\_\_\_\_ Current cash surrender value \$ \_\_\_\_\_  
The School is: \_\_\_\_ Primary beneficiary \_\_\_\_ Secondary beneficiary
  - A Qualified Retirement Plan (IRA, 401k, 403b)  
School Interest \_\_\_\_\_% Current market value of plan \$ \_\_\_\_\_  
The School is: \_\_\_\_ Primary beneficiary \_\_\_\_ Secondary beneficiary
  - A Charitable Gift Annuity  
School Interest \_\_\_\_\_% Current market value of trust \$ \_\_\_\_\_
  - A Gift of Cash  
“In Lieu of Flowers” \_\_\_\_\_ “In Memory of” \_\_\_\_\_

**SUGGESTED ENDOWMENT LANGUAGE**

I give \_\_\_\_\_ Dollars (\$\_\_\_\_\_) to Our Lady of Sorrows Catholic School located in Farmington Michigan, to be added to The Monsignor Beahan Education Endowment Fund with the income only therefore to be used for general purposes of the school.

**DOCUMENTATION**

- o Yes, I/We will share a copy of the portion of the will that applies to Our Lady of Sorrows Catholic School or the trust agreement or Change of Beneficiary Form (401k, 403b, IRAs, insurance) in which the school is named.

**AUTHORIZATION FOR USE OF NAME**

- o I/We authorize Our Lady of Sorrows Catholic School to include my/our name(s) on the membership list of The Sorrows Saints Legacy Society in publications and on public recognition displays. I/We understand that this authorization is limited to the use of my/our name(s) only, and that the type and amount of my/our gift to Our Lady of Sorrows Catholic School will remain confidential.
- o I/We prefer to remain an anonymous member(s) of The Sorrows Saints Legacy Society.

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*Signature* *Date*

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*Signature* *Date*