Legacy Gift Notification

Dear Bishop Guglielmone and Rev. _____,

I/We desire to provide for the future well-being of our Church in South Carolina by including her in my/our will and/or estate plans. I/We understand that this future commitment can be revoked or modified by me/us at any time.

The type of gift I/we have arranged is a: ____ Will ____ Trust

____ Retirement Plan or IRA ____ Charitable Remainder Trust ____ Endowment

____ Life insurance policy ____ Gift Annuity ____ Other

My gift is intended to be used for – please list parish(s) or ministry(s):

_____

I/We wish to inform the above parish(s) or ministry(s), for long-term planning purposes only, that the value of the gift is approximately $_____ (optional), or _____% of my estate, trust or insurance policy (this amount is kept confidential). I/We understand that by stating an amount my/our estate is not legally bound by this statement and that I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion.

____ You may publish my/our name(s) in your list of **Catholic Heritage Society** members to motivate and inspire others to leave a future gift to benefit the parish(s) or diocesan ministry(s) that they choose.

Please print name(s) as you would like it to appear in the **Catholic Heritage Society**:

_____

____ I/We do not want my/our name(s) published.

_____ _____

Print Name Print Spouse's Name

_____ _____

Signature Spouse's Signature

_____ _____

Date Date

Please return to: Carrie Mummert, Office of Stewardship and Mission Advancement, Diocese of Charleston
901 Orange Grove Road, Charleston, SC 29407 • P.O. Box 31257, Charleston, SC 29417
phone 843-261-0435 • www.sccatholic.org