



# St. John Francis Regis Legacy Society Notification Form

## NOTIFICATION OF REVOCABLE BEQUEST

We are pleased to advise Regis Jesuit High School that we have provided for a bequest through a provision in our wills, trust or another estate gift arrangement. For valuation purposes, the current value of this bequest provision is \$ \_\_\_\_\_.

### Type of Provision

Testamentary Gift Under Will or Trust

Conditional Bequest Under Will

Description: \_\_\_\_\_

Beneficiary of a Life Insurance Policy

Beneficiary of a Retirement Plan Account or IRA

Other

Description: \_\_\_\_\_

For accounting purposes, please provide a copy of the relevant section of your will or trust that makes provisions for Regis Jesuit. We understand that your circumstances may change from time to time. If you should ever change the amount or other details of a bequest, please advise us for planning purposes.

### Gift Designation

Unless otherwise directed, realized planned gifts to Regis Jesuit High School are allocated to the Board-Designated Fund for financial aid within our endowment and other purposes approved by the Board of Trustees.

Donor gift designation notes: \_\_\_\_\_

### Recognition

The High School acknowledges that your future bequest remains fully revocable and the specifics of your gift will be treated as confidential. However, unless otherwise requested, you will be listed as part of the SJFR Legacy Society and in donor publications and donor listings.

List our name(s) as follows: \_\_\_\_\_

Donor Name(s): \_\_\_\_\_

Birth Date(s): \_\_\_\_\_

Address/City/State/Zip: \_\_\_\_\_

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

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

When you include Regis Jesuit High School in your will or estate plan, you become a member of the St. John Francis Regis Legacy Society. This Society recognizes your important contribution and demonstrates your commitment to the mission of Regis Jesuit.

To learn more and view a list of current SJFR Legacy Society members visit  
[www.regisjesuit.com/LegacyPlanning](http://www.regisjesuit.com/LegacyPlanning)

