ST. THOMAS LEGACY SOCIETY

Confidential Membership Form & Statement of Intent

Name

Mailing Address

City \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_State\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Zip \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

This form is being submitted to:

\_\_\_\_\_\_\_ Join the Legacy Society

\_\_\_\_\_\_\_\_Update the Legacy Society Membership information

\_\_\_\_\_\_\_Express the intention to participate although the plans are not yet complete

I/we have included St. Thomas Episcopal Church in my/our long term estate plan to make a lasting impact by extending generosity to future generations through wise estate planning. I/we are pleased to declare the intention to provide for the future of St. Thomas Church with a planned gift to the church through:

\_\_\_\_\_\_ Charitable Bequest

\_\_\_\_\_\_\_ Gift of Propery

\_\_\_\_\_\_\_ Retirement Assets

\_\_\_\_\_\_\_\_ Charitable Remainder Trust

\_\_\_\_\_\_\_ Charitable Lead Trust

\_\_\_\_\_\_\_ Life insurance

\_\_\_\_\_\_ Other

*I understand that this Statement of Intent, while an expression of my current plan, is not a legal obligation binding on me or my estate. I understand that my estate plans may change.*

\_\_\_\_\_\_\_\_\_\_\_\_ Executor of Estate Plan

\_\_\_\_\_\_\_\_\_\_\_\_ Please include my name in The Legacy Society membership list.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please print your name as you would like it recognized in print.

\_\_\_\_\_\_\_\_\_\_\_\_\_ I wish to remain anonymous

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_- \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature Date

A copy of your responses will be emailed to the address you provided.