



# 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 the 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 Property
- Retirement Assets
- Charitable remainder Trust
- Charitable Lead Trust
- Life Insurance
- Other

*I understand this 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.*

- 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