



Royal Legacy Society – Letter of Intent

Welcome to the Royal Legacy Society! This membership recognizes individuals who have chosen to leave a legacy and advance the mission of Rosary Academy by making a provision for a gift to Rosary in their estate plans. Please complete and return this Letter of Intent to confirm your membership. If you are comfortable sharing documentation of your estate gift, please include such documentation with this form to enable us to more effectively steward your gift. The details on this form as well as any additional information you share with us will remain confidential.

Name(s)

Address

City, State

Zip

Phone

Email

I/We have named Rosary Academy as a beneficiary in one or more:

☐ Bequest

☐ Gift of Appreciated Property

☐ IRA Beneficiary Designation

☐ Life Insurance

☐ Charitable Lead Trust

☐ Charitable Remainder Annuity Trust

☐ Charitable Remainder Unitrust

☐ Other (please specify)

Amount or gift range (optional for long-term planning purposes only): _____

I/we hereby direct that my/our planned gift supports Rosary Academy's unrestricted Endowment Fund, unless as specified below:

All planned giving donors qualify for recognition as Royal Legacy Society members in appropriate school publications, such as the annual report, emails, and planned giving newsletters. Such recognition inspires our community. If you would prefer to remain anonymous and not have your name published, please check here: ☐

Though this Letter of Intent is an expression of my/our current plans, I/we understand that I/we may choose to increase, decrease, or revoke this bequest at any time, at your sole discretion. This document does not bind you or your estate.

Signature

Signature

Date

WELCOME TO THE ROYAL LEGACY SOCIETY

Please share a copy of this document with your estate planning attorney. Rosary Academy, a charitable organization under Section 501(c)(3) of the Internal Revenue Code, is exempt from federal income tax. The tax identification number of Rosary Academy is 95-2419408.

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CONFIDENTIAL STATEMENT