



Incarnate Word Academy Legacy Society Gift Intent Form

Through membership in the IWA Legacy Society, I/we, _____, wish to make a difference and bring the message of the Sisters of the Incarnate Word to generations that follow.

I/WE HAVE DESIGNATED A GIFT FOR THE FOLLOWING PURPOSE(S):

- Unrestricted The IWA Fund Capital Improvements The IWA Endowment
- Named Endowment Fund _____ Other: _____

THE GIFT PROVISION(S)* IS INCLUDED IN:

- Bequest in Will Trust: revocable -or- irrevocable Life Insurance Beneficiary Designation
- IRA or Retirement Plan Beneficiary Designation Other: _____

**(optional) Attaching copies of the relevant charitable gift provisions of your legal or planning documents helps us better understand your gift.*

THE VALUE OF MY/OUR GIFT IS ESTIMATED TO BE \$ _____

- Or check box here:**
- \$10,000 or less
 - \$10,000-\$25,000
 - \$25,000-\$50,000
 - \$50,000-\$100,000
 - \$100,000-\$250,000
 - More than \$250,000

IF MORE THAN ONE FUND IS NAMED, PLEASE INDICATE THE AMOUNT OR PERCENTAGE PASSING TO EACH: _____

PLEASE COMPLETE THE FOLLOWING INFORMATION:

Printed Name(s): _____

Signature: _____ Date: _____

Spouse Signature: _____ Date: _____

Address: _____

City: _____ State: _____ Zip: _____

Email: _____ Phone: _____

Executor/Financial Advisor's Name: _____ Phone: _____

PLEASE INDICATE YOUR PREFERENCE:

- Incarnate Word Academy may list my/our name(s) with other IWA Legacy Society members in any Incarnate Word Academy publication as follows: _____
- I/we prefer to remain anonymous. Please do not list my/our name(s).

NOTE: This is not a binding legal document, it is merely an indication of my/our intent to assist in fund planning for Incarnate Word Academy.



Incarnate Word
A C A D E M Y