

**Ste. Marie Parish Endowment Fund
Confidential Data Sheet**

In recognition of my/our strong belief and confidence in the Ste. Marie Parish Endowment Fund, I/we,

Confirm that we have taken steps to make a planned gift to the Ste. Marie Parish Endowment Fund
Name(s): _____

Address: _____

City/State/Zip: _____

Email: _____

Phone: _____

I/We have made the following provision for the Ste. Marie Parish Endowment Fund in my/our estate plans:

I. Bequest

A. Residuary bequest

The Ste. Marie Parish Endowment Fund's percentage of residue estate % _____

Estimated value of bequest \$ _____

B. Outright bequest in will \$ _____

Bequest subject to the following conditions (please describe)

II. Trust arrangements with the Ste. Marie Parish Endowment Fund as beneficiary

A. Present size of trust corpus \$ _____

B. The Ste. Marie Parish Endowment Fund's percentage of remainder interest \$ _____

C. Trustee (if other than Ste. Marie Parish Endowment Fund) _____

III. Life Insurance Policy

Policy face amount \$ _____

Current cash value \$ _____

Policy Number _____

Name of Company _____

Type of Policy _____

The Ste. Marie Parish Endowment Fund's interest subject to conditions (please describe)

**Ste. Marie Parish Endowment Fund
Confidential Data Sheet (cont)**

IV. Other Planned Gift(s) (please describe)

Purpose of gift to the Ste. Marie Parish Endowment Fund (Please Circle)

- 1. Unrestricted to the Ste. Marie Parish Endowment Fund
- 2. Restricted to: _____
- 3. Other Restrictions _____

Please list my/our name(s) in the Ste. Marie Parish Endowment Fund publication of donors in the following manner:

or

I/we prefer that the Ste. Marie Parish Endowment Fund does not include my/our name(s) in any publication of donors.

Date: _____

Signature(s) _____
