



## LEGACY GIFT FORM

We desire to provide for the future well-being of the Catholic Church in Oklahoma by including her in my/our will and/or estate plans. I/We understand that this future commitment can be revoked or modified by me/us at any time.

### The type of gift I/we have arranged is a:

- |   |   |                                       |
|---|---|---------------------------------------|
| <input type="checkbox"/> Will                   | <input type="checkbox"/> Charitable Remainder Trust | <input type="checkbox"/> Gift Annuity |
| <input type="checkbox"/> Trust                  | <input type="checkbox"/> Endowment                  | <input type="checkbox"/> Other        |
| <input type="checkbox"/> Retirement Plan or IRA | <input type="checkbox"/> Life Insurance Policy      |                                       |

### My/Our gift is:

- Unrestricted  
 Restricted for the benefit of \_\_\_\_\_

*Indicate one of the following: Archdiocese of Oklahoma City, Catholic Foundation of Oklahoma, Parish(s), Catholic School or Ministry*

I/We wish to inform the above parish(s) or ministry(s), for long-term planning purposes only, that the value of the gift is approximately \$ \_\_\_\_\_ (optional), or \_\_\_\_ % of my estate, trust or insurance policy (this amount is kept confidential). I/We understand that by stating an amount my/our estate is not legally bound by this statement and that I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion.

- You may publish my/our name(s) in your list of Legacy Society members to motivate and inspire others to leave a future gift to benefit the parish(s) or ministry(s) that they choose.
- I/We do not want my/our name(s) published.

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Spouse's Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

### Please return to:

Owen Canfield, The Catholic Foundation of Oklahoma, 7501 NW Expressway, Oklahoma City, OK 73132 or [ocanfield@cfook.org](mailto:ocanfield@cfook.org)