



LEGACY SOCIETY MEMBER PROFILE

Please download form, fill out the fillable areas below, and email it to us so your member profile can be included in our Legacy Society. * Indicates a required field.

* Name

* Address

* City

* State

* Zip

* Phone

* E-mail

Please check one:

The Catholic Community Foundation of Middle Tennessee may include my/our names in the Legacy Society listing. Neither amount nor designation will be included in the listing.

I am honored to be included in the Catholic Community Foundation of Middle Tennessee Legacy Society; however, I prefer to remain anonymous. Please do not include my name in the Legacy Society listing.

THE SOURCE OF YOUR BEQUEST

Please tell us more about your estate provisions for the Catholic Community Foundation of Middle Tennessee or any related entities. (Please check one or more appropriate boxes.)

Will/Trust

Life Insurance Policy

IRA or Retirement Plan

Charitable Trust

Other (please specify):

FOR A SPECIFIED (select one)

Amount

Percentage

YOUR DESIGNATED BENEFICIARY (select one)

The Diocese of Nashville

Parish or Institution Name

School

DESCRIBE HOW YOUR GIFT IS TO BE USED (select one)

Create an endowment in my name and only distribute income earned from this investment (Minimum \$100,000)

Add this gift to an existing endowment (No minimum)

Principal and interest may be used for your designated beneficiary at discretion of CCFMTN.

Save form to your computer, fill out information and email to: Ron.Szejner@ccfmtn.org