

The Borromean Society

SAINT CHARLES PREPARATORY SCHOOL

CONFIDENTIAL BEQUEST NOTIFICATION FORM

NAME: _____ DATE OF BIRTH: ___/___/___/

SPOUSE'S NAME (if applicable): _____ DATE OF BIRTH: ___/___/___/

ADDRESS: _____
STREET CITY STATE ZIP

HOME PHONE: _____ WORK PHONE: _____

ST. CHARLES GRADUATION: _____
YEAR DEGREE (applicable for College Seminary only)

MY/OUR WILL AND OTHER ESTATE PLANNING DOCUMENTS, WHICH INCLUDE A PROVISION FOR

ST. CHARLES PREPARATORY SCHOOL, WERE EXECUTED ON: ___/___/___
MONTH DAY YEAR

TYPE OF BEQUEST:

___ SPECIFIC AMOUNT ___ PERCENT OF ESTATE (___%) ___ REMAINDER OF ESTATE

TO HELP SAINT CHARLES PREPARATORY SCHOOL PLAN FOR THE FUTURE:

THE APPROXIMATE AMOUNT OF MY/OUR BEQUEST, BASED ON TODAY'S VALUE, IS \$ _____

PURPOSE/DESIGNATION OF GIFT: _____

ATTORNEY/ADVISOR NAME: _____ WORK PHONE: _____

FIRM'S NAME: _____

ADDRESS: _____
STREET CITY STATE ZIP

___ I/WE PREFER THE TERMS OF THIS GIFT TO REMAIN ANONYMOUS.

SIGNATURE

DATE

SPOUSE'S SIGNATURE (IF APPLICABLE)

DATE