

PLANNED GIFT INTENTION FORM

Thank you for including St. John's Foundation in your estate or long-term financial plans. Sharing your intentions allows us to thank you, understand your wishes, and welcome you into our Legacy Society.

This form is nonbinding. You are not required to disclose the value of your gift, and all information will be treated confidentially.

1. YOUR INFORMATION

First Name

Last Name

Email Address

Phone Number

Mailing Address

City

State

ZIP Code

2. ABOUT YOUR PLANNED GIFT

How have you included St. John's Foundation in your plans? Select all that apply.

☐ Will or living trust

☐ Retirement account or IRA

☐ Life insurance policy

☐ Bank or investment account

☐ Charitable trust or life-income gift

☐ Real estate or other property

☐ Other

☐ I am still considering my options

If other, please describe

Estimated value of planned gift (optional)

Optional and used for planning purposes only.

Please save your completed form and return it to Ryan Shear, Director of Development,
St. John's Foundation, 150 Highland Avenue, Rochester, NY 14620.

3. GIFT PURPOSE

Select one

- ☐ Please use my gift wherever it is needed most.
- ☐ I would like my gift to support a particular program or area.
- ☐ I am unsure and would like to discuss my options.

Program, area, or additional information

4. RECOGNITION PREFERENCES

Select one

May St. John's Foundation recognize you as a Legacy Society member?

- ☐ Yes, you may include my name in recognition materials.
- ☐ Yes, but please list me anonymously.
- ☐ I prefer not to be recognized publicly at this time.
- ☐ I am unsure and would like to discuss this with someone.

How would you like your name to appear?

5. STAYING IN TOUCH

Select one

Would you like someone from St. John's Foundation to contact you?

- ☐ Yes, please contact me. ☐ No, thank you. ☐ Not right now.

Preferred contact method:

- ☐ Email ☐ Phone ☐ Mail

Anything else you would like us to know?

- ☐ I confirm that I have included St. John's Foundation in my plans or am considering a future gift.

Typed Name

Date