

Beneficiary Disclosure Form

Please use this form to make known your intentions regarding gifts from your estate to the Catholic Foundation, Diocese of St. Petersburg, or an entity of the Diocese of St. Petersburg including parishes, schools and ministries. This intention form is for **informational purposes only**. Your estate is **NOT** legally bound by this declaration. Your commitment remains revocable and can be modified, by you, at any time.

We pledge to hold this information in the strictest of confidence.

Donor Name(s): _____
Date(s) of Birth: _____
Address: _____
City, State, Zip Code: _____
Phone: _____ Email: _____

As evidence of our desire to provide a legacy of support for the needs of _____
_____*(beneficiary name/description)*, I/we wish to inform
the Catholic Foundation and/or the Bishop of St. Petersburg that I/we have made a
bequest in my/our estate plans in the following manner:

Bequest in my/our _____ Will
_____ Insurance policy
_____ IRA/Retirement Account

Type of bequest _____ A percentage bequest of _____ %
_____ A specific bequest gift amount of \$ _____
_____ Other: _____

As of this date, the approximate value of my/our gift is \$_____.

I/we wish to designate our gift to be used for the benefit of _____
_____*(beneficiary name/description)*.

_____ *Unrestricted Support* – where the need is greatest as determined by the
pastor/leader as noted in my/our estate documents.

_____ *Restricted Support* – designated for a specific purpose or endowed fund as
described here: _____

