

Charitable Disclosure Form

Please use this sheet to inform us of the details of your bequest intentions or charitable fund for the Catholic Education Foundation of the Diocese of Joliet (CEF). In recognition of your disclosure, we will be honored to invite you to join the *Fr. Mac Legacy Society*, a select group of donors that have created a future gift intention for the CEF and the educational needs of the Roman Catholic Diocese of Joliet. The Society also honors a very special priest and charter member of the CEF Board of Directors, Fr. Frank McDonald, who dedicated his priestly life to Catholic education.

This intention form is for informational purposes only - your estate is NOT legally bound by submitting this statement. Your commitment remains revocable and can be modified at any time.

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

Donor(s) Name(s): _____

Date(s) of Birth: _____

Address: _____

City/State/ZIP: _____

Phone: _____ **Home Email:** _____

Gift Specifics:

Bequest

As evidence of our desire to provide a legacy of support for the educational needs of the Catholic Church, I/we wish to inform the Catholic Education Foundation that you have been named in my/our estate plans. (A copy of the relevant information is attached).

As of this date, the approximate value of my/our gift is \$_____ (If your gift is a percentage of your estate, please indicate the approximate present value of that percentage.)

I/we designate this gift to be used for:

(please circle)

- ✓ **Unrestricted Support** (where the need is greatest as determined by the CEF Board of Directors)
OR
✓ **Restricted Support of a specific school or scholarship program:** (note your intentions on the line below)

(describe) _____

Charitable Disclosure Form – Page 2

Charitable Fund

As evidence of our desire to provide a legacy of support for the educational needs and ministries of the Catholic Church, I/we wish to inform the Catholic Education Foundation that you have been named in my/our estate plans through (*check any appropriate line*):

☐ Will ☐ Charitable Trust ☐ Donor Advised Fund or Endowment ☐ Designated Beneficiary

☐ Other (describe) _____

As of this date, the approximate value of my/our gift is \$_____ (A copy of the relevant funding information is attached).

(please circle)

- ☒ **Unrestricted Support** (where the need is greatest as determined by the CEF Board of Directors)
OR
☒ **Restricted Support of a specific school or scholarship program:** (note your intentions on the line below)

(describe) _____

Fr. Mac Legacy Society

In recognition of your intention, we are pleased to induct you as a member of the *Fr. Mac Legacy Society*.

(please circle)

- ☒ **Yes, you may publicize my/our name(s) as members of the Fr. Mac Legacy Society, which serves as a motivation for others to consider a future gift in support of the CEF.**
☒ **I/We prefer my/our intentions to remain anonymous.**

Donor(s) Signature(s):

_____ Date: _____

_____ Date: _____

Please return this form to:

Catholic Education Foundation 16555 Weber Road Crest Hill, IL 60403

Phone: 815-221-6127 or Email: JLangenderfer@dioceseofjoliet.org

Thank you for your support of the educational ministries of the Catholic Education Foundation.