



# JSERRA CATHOLIC HIGH SCHOOL

FAITH. INTELLECT. CHARACTER.

## PLANNED GIVING

If you have made provisions in your estate for a gift to JSerra Catholic High School, please take a moment to complete the form below and return it to us. If you are comfortable sharing documentation of your estate gift, please include such documentation with this form to enable us to steward your gift more effectively. The details on this form as well as any additional information you share with us will remain confidential.

Donor Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City, ST, ZIP \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

**I/We have named JSerra Catholic High School as a beneficiary in one or more:**

☐ Will ☐ IRA, pension, or other retirement account ☐ Lead Trust  
☐ Charitable Remainder Trust (Trustee is not JSerra Catholic H.S.) ☐ Revocable or Living Trust  
☐ Other (please specify) \_\_\_\_\_

Approximate current value: \$ \_\_\_\_\_

Gift designation (if any) \_\_\_\_\_

Comments:

Signed in agreement:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## Welcome to the JSERRA HERITAGE SOCIETY

The JSerra Heritage Society is exclusively for individuals who have made a planned giving benefaction to JSerra Catholic High School. By completing this form, you will automatically be enrolled.

*This document does not bind you or your estate. You may choose to increase, decrease, or revoke this bequest at any time, at your sole discretion. JSerra Catholic High School is a registered 501(c)3 tax exempt organization, Federal Tax ID 33-0901351. Your gift is tax-deductible to the extent allowable by law.*