



ST. PATRICK LEGACY SOCIETY ENROLLMENT FORM

I am (We are) very interested in the future of St. Patrick Catholic Church and the role it plays in the lives of our entire parish family. I am (We are) also interested in helping ensure the parish's future financial stability. It is with faith and the knowledge that all gifts come from God that I (we) made provisions for a bequest to be given as indicated below at the time of my (our) death.

Recipient(s) of Your Bequest for the Benefit of Your Parish Family	Estimated Percentages and Dollar Amounts**	
"St. Patrick Catholic Church of Cedar Falls, Iowa"	%	\$
"St. Patrick, Cedar Falls School Endowment Fund"	%	\$
"St. Patrick Catholic School of Cedar Falls, Iowa"	%	\$
<i>Total Must Equal 100% and Total Estimated Bequest</i>	%	\$

Completion Checklist:

1. ____ I (we) understand this enrollment form is not legally binding. It is an expression of intent. **I (We) have reviewed the Naming Descriptions and Sample Bequest Language on the REVERSE SIDE of this form and have shared it with my (our) legal and financial advisors.**

2. ____ I (we) have completed the necessary changes to my (our) legal documents such as my (our) Last Will and Testament, trust, beneficiary designations, or other legal documentation to create a legally binding bequest.

Name(s) _____
Print as you prefer displayed on the membership list. Check here if you wish to be displayed as "Anonymous":

Address _____

_____ Phone Number(s) _____

Signature(s) _____ Date _____

_____ Date _____

The following method(s) was used to make this provision (*please check all that apply*):**

- _____ A provision in my (our) Last Will and Testament or trust
- _____ A life insurance policy, naming recipient(s) as a primary beneficiary
- _____ An IRA or other retirement program, naming recipient(s) as a beneficiary
- _____ Real estate, with a retained life interest
- _____ A charitable gift annuity



_____ A charitable remainder trust

_____ Other (please specify) _____

**** This information is for Legacy Society information and tracking purposes only. It will not be shared publically.**

Specific Naming Descriptions for Bequest Recipients

Church: "St. Patrick Catholic Church of Cedar Falls, Iowa"

School Endowment Fund: "St. Patrick, Cedar Falls School Endowment Fund"

School: "St. Patrick Catholic School of Cedar Falls, Iowa"

Sample Bequest Language for "St. Patrick, Cedar Falls School Endowment Fund"

1. Outright bequest in Last Will and Testament

(a) Specific dollar amount:

"I give the sum of \$ _____ to The Catholic Foundation for the Archdiocese of Dubuque, a nonprofit corporation located in Cedar Rapids, IA, to be added to the St. Patrick, Cedar Falls School Endowment Fund, a designated fund of The Catholic Foundation for the Archdiocese of Dubuque."

(b) Specific property:

"I give all my right, title and interest in and to <DESCRIPTION OF PROPERTY> to The Catholic Foundation for the Archdiocese of Dubuque, a nonprofit corporation located in Cedar Rapids, IA, to be added to, St. Patrick, Cedar Falls School Endowment Fund, a designated fund of The Catholic Foundation for the Archdiocese of Dubuque."

(c) Share of, or entire residue, of estate:

"I give (all/or ____ %) of the residue of my estate to The Catholic Foundation for the Archdiocese of Dubuque, a nonprofit corporation located in Cedar Rapids, IA, to be added to the St. Patrick, Cedar Falls School Endowment Fund, a designated fund of The Catholic Foundation for the Archdiocese of Dubuque."

2. Conditional bequest in will

Insert the conditional language in the above provisions. For example:

"If my husband/wife does not survive me, I give the sum of \$ _____ to The Catholic Foundation for the Archdiocese of Dubuque, a nonprofit corporation located in Cedar Rapids, IA, to be added to the St. Patrick, Cedar Falls School Endowment Fund, a designated fund of The Catholic Foundation for the Archdiocese of Dubuque."

3. Flexibility Clause

Please add the following language to all bequests

"If, in the judgment of The Catholic Foundation for the Archdiocese of Dubuque, a nonprofit corporation located in Cedar Rapids, IA ("CFAD"), it becomes impossible to accomplish the purposes of this gift, the income and/or principal may be used for such related purposes and in such manner as determined in the sole discretion of CFAD."

We advise you to review this language with your own legal counsel. This language is not provided as legal advice. Please discuss these issues with your own legal counsel.