FRIENDS OF John Paul School

Leave a Gift in Your Will

Where it began, where it grows: leave a gift in your will.

Shade Tree Society · Confidential Letter of Intent



Thank you for thinking of the students of John Paul Secondary School in your plans. Completing this letter is optional. It lets us thank you, honor your wishes, and welcome you to the Shade Tree Society. **It is confidential and is not a legal commitment.** You may change or withdraw it at any time.

1. About you

Name(s) _____ Phone _____

Mailing address _____ Email _____

2. Your gift

I/we have included Friends of John Paul School in my/our plans through (check all that apply):

- ☐ Will or living trust (bequest)
- ☐ Retirement account beneficiary designation (IRA, 401(k), 403(b))
- ☐ Life insurance
- ☐ Real estate, stock, or other assets
- ☐ Charitable gift annuity or charitable trust
- ☐ Other: _____

Estimated value (optional): $ _____ OR _____ % of my/our estate

- ☐ My/our plans are in place
- ☐ I/we are still working on them

How should the gift be used?

- ☐ For the school's greatest needs (this lets us direct it where it matters most)
- ☐ For a specific purpose: _____ (we will call you to talk it through)

Estimates are only for our planning, and values may change. Please do not include account numbers or Social Security numbers on this form.

3. Recognition

- ☐ You **may** recognize my/our gift publicly (newsletters, annual reports, donor lists). Please list me/us as: _____
- ☐ Please **keep my/our gift private.** A private thank-you and acknowledgement are welcome.

4. Someone we may contact (optional)

Is there someone we should reach out to when your gift is realized, to honor your legacy?

Name and relationship _____ Phone or email _____

5. Signature

Signature _____ Date _____ Printed name _____

Return this form to: Friends of John Paul School, P. O. Box 80815, Rochester, MI 48308-0815, or email a scan to info@johnpaulschool.com. Questions? Contact Liz Comerford, President, at lizcomerford@johnpaulschool.com. Please talk with your attorney or financial advisor about how to make your gift.