

Thomas More Prep-Marian High School
Holy Family Elementary School

Statement of Testamentary Provision

NOTICE TO DONOR: *We deeply appreciate your support and understand the confidentiality of this information. Every attempt will be made to comply with your wishes. This information is for planning purposes only. We appreciate the opportunity to measure the level of our future budgetary commitments to serving the needs of Thomas More Prep-Marian High School and Holy Family Elementary School.*

As an indication of our (my) support for Thomas More Prep-Marian and Holy Family Elementary, we (I) certify that we (I) have made an estate provision as follows:

DESCRIPTION OF ESTATE PROVISION

1. To which of the entities is the gift intended (You may identify more than one)

- Thomas More Prep-Marian High School
- Holy Family Elementary School
- Thomas More Prep-Marian Endowment Foundation
- Thomas More Prep-Marian Alumni Association

2. Gift Through Will or Trust

- Bequest of specific property or amount. Description: _____
- Bequest of percentage of estate (please indicate percentage _____ %).
- Bequest of Charitable Unitrust or a Charitable Annuity in my will/trust
- Bequest to my spouse, then to Thomas More Prep-Marian
- Bequest to my children or others, then to Thomas More Prep-Marian

Further Description of Gift:

3. Gifts that provide life income, administered by another financial institution:

- Charitable Unitrust/Annuity Trust
- Charitable Gift Annuity
- Deferred Gift Annuity

Further Description of Gift (unitrust or annuity manager, type of trust or annuity):

4. As beneficiary of a Life Insurance Policy/Retirement Plan:

Policy Number _____

Company _____

Type of Policy/Plan _____

Further Description of Gift:

5. Payable/Transfer on Death of CDs, Bonds, Mutual Funds, etc....

Policy Number _____

Company _____

Type of Policy/Plan _____

Further Description of Gift:

With the understanding that values are subject to change, at this time we expect the value of our future provision to be approximately:

\$ _____

We appreciate notice of any changes in the prior stated provisions that might be made in the future.

DESIGNATION OF FUTURE GIFT(S) TO THOMAS MORE PREP-MARIAN:

- Our (My) Gift is unrestricted and may be used where the need is greatest.
- We (I) have specified the future gift to be used for the following purpose:

Attachments or letters that further describe the previous listed provision(s) are encouraged. In particular, a copy of the section of your will, trust agreement, or other document containing the provision(s) will be appreciated. A photograph of yourself would also be greatly appreciated.

COMMUNICATION AUTHORIZATION

- We (I) authorize this information to be shared internally among the following entities as necessary: Thomas More Prep-Marian High School, Holy Family Elementary, Endowment Foundation of Thomas More Prep-Marian, Inc. and the Alumni Association of Thomas More Prep-Marian.

SIGNATURES OF DONORS

Name

Name

Social Security No. (Optional)

Social Security No. (Optional)

Date of Birth

Date of Birth

Date

Date

Please return completed form to:

Advancement Office
Catholic Schools of Hays
1701 Hall St.
Hays, KS 67601
785-625-6577
(fax) 785-625-3912