



SAINT JOSEPH NOTRE DAME HIGH SCHOOL

### STATEMENT OF INTENT - ESTATE GIFT

I/We wish to support the mission and activities of Saint Joseph Notre Dame High School. Therefore, in addition to gifts previously made or that I/we may make in the future, I/we hereby declare that I/we have made provision for St. Joseph Notre Dame High School in my/our estate plan<sup>1</sup> by:

- Specific bequest**
- Percentage bequest**
- Residual bequest**
- Testamentary trust** -*SJND named an ultimate beneficiary*
- Life insurance, retirement account, or other instrument** – *SJND named a beneficiary*
- Other** (please specify): \_\_\_\_\_

Estimated value of estate gift: \$ \_\_\_\_\_ (optional)

It is my/our intention, as expressed in the appropriate gift instrument, that St. Joseph Notre Dame High School use my/our estate gift in the following manner:

- Unrestricted support** – Utilize wherever the school has a need at time of receipt.
- Restricted support:**
  - Tuition Assistance
  - Scholarships
  - Specific School Program \_\_\_\_\_ (name of program)
  - General Endowment Fund <sup>2</sup>
  - Named Endowed Fund <sup>2</sup> \_\_\_\_\_ (name of fund)  
(\$50K minimum contribution for establishing a new named endowed fund)
  - Other \_\_\_\_\_
  - Other Project (specify): \_\_\_\_\_

WITNESS my/our signature(s) this \_\_\_\_\_ day of \_\_\_\_\_, 201\_\_.

Print Name	Print Name
Signature	Signature

<sup>1</sup> In order to assure SJND’s ability to honor the wishes of our donors, we welcome for our permanent confidential records a copy of the appropriate sections(s) of your the Last Will and Testament, revocable living trust, or other relevant documentation.

<sup>2</sup> For donors leaving a bequest to fund a restricted endowment, please consult with the Advancement Department to assure that we understand your intent. We also recommend the inclusion of the following language as optional, but suggested, in order to ensure that a bequest designated for a specific use will always remain productive if circumstances change unexpectedly:  
*“If changed circumstances should at some future time make it impractical to continue using the income from the endowment for the purpose designated, then the SJND may redesignate the purpose to adhere as closely as possible to my/our original intent.”*

Please return this completed form to: SJND, Att: Mollie McFarland, 1011 Chestnut St., Alameda, CA 94501