



Planned Gift Letter of Intent

As an investment in Academy of the Holy Names, I intend to establish or have established an estate gift naming Academy of the Holy Names as an ultimate beneficiary.

I have made or plan to make the following planned gift(s) to Academy of the Holy Names:

- Bequest in a Will / Living Trust
Charitable Gift Annuity
Insurance Policy
Individual Retirement Account
Bank, Brokerage or Other Acct.
Other Provision:

I agree to have my name published in AHN publications as a motivation for others to leave a future gift to benefit Holy Names (e.g. EQV Magazine, Planned Giving Brochure, AHN Website) The amount of my gift is not published and remains confidential.

My name should be acknowledged as: in the Mother Marie Rose Legacy Society.

I wish this planned gift to remain anonymous at this time.

Signature Class Year (if applicable)

Printed Name Date

Address

City/State/Zip

Phone Email

Financial Planning Advisor:

Attorney:

This Planned Gift Letter of Intent shall not constitute a legal binding obligation and shall not be legally binding in any way on my estate or me. While I consider that I have a moral obligation to make this gift, I reserve the right to adjust or cancel it in the event of unforeseen circumstances.

Please return this form to the Office of Institutional Advancement, Academy of the Holy Names, 1075 New Scotland Rd, Albany NY 12208. Thank you for your support.