



Legacy Gift – Declaration of Intent

Thank you for including the Congregation of the Sisters of St. Joseph in your estate plans. We are deeply honored by your commitment. This form will help us keep accurate records and understand your preferences. Please note that this is not a binding legal document and all information will be kept in the strictest confidence.

Your Contact information: (please add or edit as needed)

Name: _____
 Address: _____
 City: _____ State: _____ Zip: _____
 Email: _____
 Phone: _____

I have included the Congregation of the Sisters of St. Joseph in my estate plans in the following ways:

Will **Beneficiary of IRA or Life Insurance** **Other**

If you need additional space for details below, please explain on a separate paper and include with this form
 (Optional) Gift Details (amount, percent estate, etc.):

(Optional) Gift preference or restrictions:

Recognition Preferences

- Please list my name as follows: _____
- Please *do not* list my name. I prefer to remain anonymous.
- (Optional) My _____ Is in
 gift is in honor of _____ memory of _____

Signature: _____ **Date:** _____

Please return to: Pat Milenius, Director of Advancing Mission and Partnerships, Congregation of St. Joseph, 3430 Rocky River Drive, Cleveland, OH 44111 or pmilenius@csjoseph.org; Phone: 216.688.3477

Please consult your accountant or tax attorney to determine the tax deductibility of your donation.