



Bequest Intention Form

In order that we may properly consider your bequest for the benefit of *Upon This Rock*, value your future gift for campaign accounting purposes, and properly acknowledge your intention, please complete the following information as it applies to your gift as a bequest through your will or trust.

Completing this form is not binding on you or your estate. To effectuate a change in your estate plans, you must make a modification to your will or trust. Typically, this means meeting with your attorney and completing a brief attachment (a.k.a. "Codicil") that adds the Foundation of the Roman Catholic Diocese of Buffalo (FRCDB) as a beneficiary. When meeting with your attorney to make the necessary changes, please take this form with you to provide him or her with the appropriate contact information.

My Will/Codicil/Trust was signed on: _____ provides that \$ _____ shall be bequeathed to the FRCDB for the benefit of *Upon This Rock*.

My Will/Codicil/Trust was signed on: _____ provides that _____% shall be bequeathed through my estate to the FRCDB for the benefit of *Upon This Rock*. As of today's date, I estimate that the value of this provision of my estate plan would be approximately \$ _____.

My Will/Trust was signed on: _____ provides that certain items of real or personal property shall be bequeathed through my estate to the FRCDB for the benefit of *Upon This Rock*. The items are as follows:

As of today's date, I estimate these items to be worth approximately \$ _____

I have designated, through my IRA/Qualified Plan held by (name of custodian or trustee _____) that ___% or \$ _____ of my account at death is to be paid to FRCDB for the benefit of *Upon This Rock*.

I have special instructions associated with my gift as follows: _____

Donor's Name: _____ Date: _____

Donor's Signature: _____

Donor's Telephone Number: _____ Donor's DOB: _____

Attorney's Contact Information: _____

Donor ID: _____

Parish ID: _____