



Heritage Society

THE HERITAGE SOCIETY

Mount St. Joseph University has established the Heritage Society to recognize those dedicated alumni and friends who have chosen to honor the University through a commitment in their wills, a charitable trust, life income plan, life insurance, or other estate planning technique.

The Society was so named because of the lasting impact estate contributions will have on the future of the University and the students it serves.

Planned Gift Intention Form

To demonstrate my/our commitment to the mission of Mount St. Joseph University, I/we have made charitable provisions for Mount St. Joseph University in my/our estate plans.

Name(s): _____

Birthdate(s): _____

Address: _____

Phone: (____) _____ Email: _____

Please indicate your type of planned gift below:

_____ Bequest

_____ Charitable Gift Annuity

_____ Insurance

_____ Charitable Lead Trust

_____ Charitable Remainder Trust

_____ Life Estate Agreement

Other, please define _____



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The approximate value is \$_____. (for accounting purposes only)

I have designated these assets to the University:

_____ Without restriction _____ Restricted for the purpose of: _____

_____ A gift agreement _____ has _____ has not been created.

_____ A copy of the estate plan document _____ is _____ is not attached.

We would:

_____ be pleased to be acknowledged as members of the Heritage Society.

- Donors agree that their names may be publicly recognized in connection with this intention (print and electronic media).
- Donors agree that the amount of their gift may be publicly recognized in connection with this intention (print and electronic media).
- Donors wish to remain anonymous.

_____ prefer not to be publicly acknowledged as members of the Heritage Society, but we will accept other benefits of membership.

Date

Donor

Date

Donor



Heritage Society

Please return form to:

Joe Cornely, Director of Advancement

Mount St. Joseph University, 5701 Delhi Road | Cincinnati, OH 45233-1672

Phone: 513-244-4955 Email: Joseph.Cornely@msj.edu

Completion of this form is not intended to be legally binding, but notification of intent. Please discuss your planned giving intentions with your professional financial advisor. Mount St. Joseph University is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code, Tax ID #23-7179567. Contributions are deductible as allowed by law.