



St. Paul's 1827 Society

Bequest Intention Form

By completing this form you signify your intent to name St. Paul's Episcopal Church as a beneficiary of your estate. St. Paul's understands that all bequest provisions are revocable and that any intentions stated here are not binding on you or your estate. We are deeply grateful for your vision and generosity.

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

I estimate the total value of this gift will be: _____

ANTICIPATED SOURCE OF GIFT

- ☐ Cash
- ☐ Marketable Securities Shares of _____
- ☐ Mutual Funds Shares of _____
- ☐ Real Estate _____
- ☐ IRA/Retirement Plan/Life Insurance (by beneficiary designation)
- ☐ Closely held stock, partnership, or LLC interest
- ☐ Charitable trust interest
- ☐ Other _____

THE PERSON WHO WILL HANDLE MY ESTATE AFFAIRS IS:

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

YOUR GIFT QUALIFIES YOU FOR MEMBERSHIP IN THE 1827 SOCIETY

- ☐ Yes, St. Paul's may publish my name as a member of The 1827 Society
- ☐ I am honored to become a member The 1827 Society, but I wish to remain anonymous and request that my name not be published in connection with my bequest intention.

Signature

Printed Name

Date