



LETTER OF INTENT

If you have made, or intend to make, an estate gift to Xavier College Preparatory, please complete this form.

Name _____ Name _____

Address _____ City _____ State _____ Zip _____

E-mail _____ Phone _____

Alternate family contact _____ Phone _____

GIFT DETAILS: Will Trust (Charitable Remainder, Charitable Lead, Living, etc.)

Life Insurance Annuity Donor Advised Fund

IRA, Retirement Accounts (401K, pension, etc.) Appreciated Assets (real estate, stocks, etc.)

Other (please specify) _____

Approximate value of your estate gift to Xavier \$ _____

Name of Trust, Life Insurance, IRA, or pension company (if applicable) _____

GIFT DESIGNATION: Unrestricted (area of greatest need)

Scholarship Program Other _____

GIFT RECOGNITION: Join Xavier's Heritage Circle!

We would be honored to enroll you in *Xavier's Mother Mary Frances Clarke Heritage Circle* for your estate gift. Named after the founding mother of the BVM Sisters, *Xavier's Mother Mary Frances Clarke Heritage Circle* was established to secure planned gifts for Xavier's long term needs and to honor Xavier's legacy donors for their support.

Yes, please include me in the Xavier Heritage Circle listing to encourage others to do the same.

Attached are my applicable documents (will, trust, life insurance, and/or other beneficiary forms).

Signature _____ Date _____ Birth Date _____

Signature _____ Date _____ Birth Date _____

THANK YOU for including Xavier in your estate plan!

For more information, please go to XCP.ORG/PG or call 602-240-3133.