



LEGACY GIFT FORM

Did you know you can support the Ursuline Sisters through your deferred gift plans? Bequests, trusts, and other forms of planned gifts serve as the foundation for the ministries and care of the Ursuline Sisters of Cleveland. If you wish to include the Ursuline Sisters as a beneficiary in a will, trust, retirement plan, or some other deferred giving vehicle, we hope that you will share this good news with us.

This record will help us ensure that your wishes are fulfilled, and it will also allow us to honor you as a member of the **Merici Society**, which recognizes alumni, family, and friends who have provided for the Ursuline Sisters through their estate plans or some other form of deferred gift.

Name(s) _____

Street _____

City _____

State _____

Zip _____

Birth Date(s) _____

Please describe your deferred gift (or attach a copy of documentation, if you prefer):

☐ Will ☐ Revocable "Living" Trust ☐ IRA or Other Retirement Account ☐ Donor Advised Fund
☐ Charitable Remainder Trust ☐ Life Insurance Policy ☐ Other _____

How would you like the Ursuline Sisters to use your gift? Unrestricted gifts are used by the sisters to address their most pressing needs at the time of receipt. You may also direct your gift to support areas that speak to your own passions, for example, care of elderly Sisters or the Angela Fund for Ministry.

If you are comfortable doing so, please provide an estimate of the current value of your deferred gift to the Ursuline Sisters. This estimate will allow us to ensure that the Ursuline Sisters will be able to use your gift as you have specified above. All such information will be kept confidential.

Estimate: _____

May we include your name(s) in periodic donor rosters and lists of Merici Society members?

- ☐ Yes, you may print my/our name(s) in **Merici Society** rosters published by the Ursuline Sisters.
☐ No, please do not print my/our name(s) in **Merici Society** rosters.

Signature _____

Signature _____

Date _____

This document does not bind you or your estate. By signing this form, you are simply acknowledging your current plans to benefit the Ursuline Sisters in the future and giving them guidance as to your wishes. The Ursuline Sisters recognize that gift plans may change over time, and we hope you will consider notifying us of any relevant changes in your plans. We very much appreciate your expression of support for the Ursuline Sisters and our important mission.

Please return completed forms, and direct any questions, to:
The Ursuline Sisters of Cleveland
(Legal title: Ursuline Academy of Cleveland EIN#34-0832279)
6085 Parkland Blvd, Suite 175, Mayfield Hts, OH 44124
440.229.5634