



## **Bequest Intention Form**

Thank you for your intention to include St. John Neumann Catholic Church (SJN) in your estate plan. We ask that you complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation.

Is this a **new** intention or an **updated** intention? \_\_\_\_\_

### **My/Our Information**

Name (print): \_\_\_\_\_ Spouse name (if joint gift): \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone number: \_\_\_\_\_ E-mail address: \_\_\_\_\_

### **Gift Information**

I/We have provided a gift to St. John Neumann Catholic Church (SJN) as set forth in My/Our:

Will or Trust

Life Insurance Policy

IRA or Retirement Plan Assets

Other Asset(s) (please describe): \_\_\_\_\_

Specific amount OR...

Percentage of estate

SJN is a contingent beneficiary of the indicated asset(s) above (please explain):  
\_\_\_\_\_  
\_\_\_\_\_

With the understanding that values are subject to change, I/We estimate that the current value of the gift to SJN is approximately \$ \_\_\_\_\_ in today's U.S. dollars. My/Our gift is \_\_\_\_\_% of the asset(s) indicated above. If a percentage is given, with the understanding that values are subject to change, I/We estimate that the current value of the percentage is approximately \$ \_\_\_\_\_ in today's U.S. dollars.

### **Please select one of the below:**

This gift is to be unrestricted and used where the need is greatest.

This gift is to be restricted and used specifically for this particular purpose (which may include St. John Neumann Catholic School): \_\_\_\_\_

**Please continue to the reverse side to complete the form.**

I/We understand that this gift is revocable and can be changed at any time. I/We further understand that I/We and/or My/Our Estate am/are not legally or morally obligated to fulfill this intention if I/We choose to modify or cancel My/Our gift at a future date.

I/We will inform you if I/We change My/Our intent toward SJN or if the value of My/Our gift significantly increases or decreases.

**Recognition**

Periodically, SJN may recognize planned giving donors as “St. John Neumann Legacy Donors”. This is our way of thanking and recognizing you now for your contributions to our parish, which will also inspire others to follow in your footsteps.

\_\_\_\_ I/We prefer no recognition.

\_\_\_\_ Please recognize Me/Us and list My/Our name(s) as follows: \_\_\_\_\_

I/We understand this form does not create a binding obligation and any details about My/Our gift will remain confidential (only SJN officials will have knowledge of the gift details). SJN understands that the size of My/Our future gift may change.

**Signature:** \_\_\_\_\_ **Spouse Signature** (if joint): \_\_\_\_\_

**Date:** \_\_\_\_\_

**Columbarium**

\_\_\_\_ I would like information regarding the St. John Neumann columbarium. (FYI: This is not a requirement for documenting a gift or recognition as an SJN Legacy Donor, but we would certainly like to provide columbarium details if you are interested in learning more about it.)

**Thank you for your generosity in supporting St. John Neumann Catholic Church.**

*“You shall surely give to him, and your heart should not be grieved when you give to him, because for this thing the Lord your God will bless you in all your works and in all to which you put your hand.”*  
Deuteronomy 15:10

Please return this form to Patrick Wade, SJN Director of Development:

St. John Neumann Catholic Church  
Attn: Patrick Wade  
633 St. John Ct  
Knoxville, TN 37934

If you have any questions, please contact Patrick Wade at (865)777-3410 or pwade@sjnknox.org.

**This document is designed to provide general information that we hope will be helpful to you in your tax, estate, and charitable planning. It is not intended as legal advice and should not be relied upon as legal advice. For advice or assistance with your particular situation, you should consult an attorney or other professional advisor.**