



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.