



Catherine McAuley Legacy Society

Confidential Gift Intention Form

Created in 2013, the Catherine McAuley Legacy Society honors and celebrates those who have pledged legacy gifts to benefit Gwynedd and future generations of Mercy girls through their estate plans. To enroll, simply complete this form to notify Gwynedd of your generous intention. Please note this document is for informational purposes only and is not legally binding. All details shared remain confidential.

I have named Gwynedd as a beneficiary of a: (Check as many as apply.)

- | | |
|--|---|
| <input type="checkbox"/> Will | <input type="checkbox"/> Revocable Charitable Trust |
| <input type="checkbox"/> Retirement Plan/IRA | <input type="checkbox"/> Irrevocable Charitable Trust |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Other (Please specify.): |

Gwynedd is listed as a: (Check one.)

Please indicate the approximate dollar value or % of the estate in which Gwynedd is named and whether Gwynedd is to receive the residue or remainder of the estate. (Optional.)

- | | |
|--|-------|
| <input type="checkbox"/> Primary Beneficiary \$/% | _____ |
| <input type="checkbox"/> Secondary Beneficiary \$/% | _____ |
| <input type="checkbox"/> Contingent Beneficiary \$/% | _____ |

Gift purpose: (Check one.)

- | |
|---|
| <input type="checkbox"/> My/Our gift is unrestricted to allow the School to meet its greatest needs and highest priorities. |
| <input type="checkbox"/> I/We wish that the School use these funds for the following purpose: |

Gift Recognition: (Check one.)

- | | |
|---|---|
| <input type="checkbox"/> Please list me/us in the Catherine McAuley Legacy Society. | <input type="checkbox"/> I/We prefer to remain anonymous. |
|---|---|

Donor Name(s):* _____

Signature #1: _____

Signature #2: (If applicable): _____

Street Address: _____

City: _____ State: _____ Zip: _____

Preferred Phone: _____

Preferred Email: _____

Date: _____

Please return this form by mail or email to:

Colleen Belz Frascatore '89, Office of Advancement, Gwynedd Mercy Academy High School
PO Box 902, 1345 Sumneytown Pike, Gwynedd Valley, PA 19437 / cfrascatore@gmahs.org