



Planned Giving

GIFT INTENTION FORM

_____ have/has established a deferred or planned gift for the benefit of Lake Catholic High School. By completing this form, we inform Lake Catholic of our current planned giving intentions.

Please designate my/our gift for the following purposes:

Area of Greatest Need at Lake Catholic High School

Other _____

The value of our gift is estimated to be \$ _____

I/We plan to give this gift through:

Retirement Plan Account (IRA, 401k)

Life Insurance Policy

Will/Bequest

Stock

Other _____

Please select one:

Check here to permit Lake Catholic High School to include our name(s) as part of the Cougar Legacy Society.

Check here if you wish your gift to be anonymous.

(continued on next page)



Name: _____

Signature: _____ Date: _____

Spouse Signature (if applicable): _____ Date: _____

Address: _____

Phone: _____

Email Address: _____

Financial Advisors Name and Contact Information: _____

This is not a binding legal document. It is an indication of my intent to support Lake Catholic High School.