



Our Lady of Victory
Foundation
Creating Tomorrow's Parish Today

Thank you for including Our Lady of Victory Foundation in your estate plans. Your thoughtful provision helps to strengthen our parish and school and assures future generations of parishioners will benefit from the vibrant faith-filled community established when our parish was founded.

The foundation has adopted the best practice of documenting future planned gift expectancies by completing a description of the planned gift and where possible, the approximate value of the future expectancy. Donors are asked to sign a form that provides a description of the planned gift. This practice helps to ensure that we understand and are able to honor your wishes as it relates to your planned gift. It also allows the foundation to track progress in our goal to grow the endowment, and report to our Parish Leadership future expectancies, a key indicator to our success.

Date: _____ **OLV Foundation Representative:** _____

Donor Name (s): _____

Address: _____

Type of Planned Gift

___ Bequest Description: _____

If Residual beneficiary of estate, ___ % of estate; Approximate value of estate _____

___ Insurance policy beneficiary Policy owned by OLV Foundation Yes No

Type of Policy (Term, Whole Life, Universal Life, etc.) _____

___ IRA beneficiary

___ Charitable Remainder Trust, Charitable Annuity Trust, Living Trust, Lead Trust (circle type)

Does OLV Foundation have copy of relevant pages of Will, Trust, etc? Yes No

Is this gift anonymous? Yes No

Name & Contact information of Attorney, Financial Advisor, Executor, or Personal Representative:

Designation of Planned Gift *

These funds should be applied:

- General Education Fund
- JFK Staff (Salary and Benefits)
- JFK Scholarship Fund
- JFK Facilities Fund
- OLV Parish Facility Fund
- OLV Unspecified Fund

Donor signature **Date** **Donor signature** **Date**

* Unrestricted gifts are the greatest benefit to the foundation because they allow maximum flexibility to meet the area of highest need.