



THE BORROMEAN SOCIETY

ST. CHARLES PREPARATORY SCHOOL

CONFIDENTIAL BEQUEST NOTIFICATION FORM

NAME: _____ DATE OF BIRTH: ___/___/___

SPOUSE'S NAME (if applicable): _____ DATE OF BIRTH: ___/___/___

ADDRESS: _____
STREET CITY STATE ZIP

HOME PHONE: _____ WORK PHONE: _____ CELL PHONE: _____

EMAIL ADDRESS: _____

ST. CHARLES GRADUATION (if applicable): _____
YEAR DEGREE (applicable for College Seminary only)

MY/OUR WILL AND OTHER ESTATE PLANNING DOCUMENTS, WHICH INCLUDE A PROVISION FOR ST. CHARLES PREPARATORY SCHOOL, WERE EXECUTED ON: ___/___/___
MONTH DAY YEAR

TYPE OF BEQUEST:

___ SPECIFIC AMOUNT ___ PERCENT OF ESTATE (___%) ___ REMAINDER OF ESTATE

TO HELP ST. CHARLES PREPARATORY SCHOOL PLAN FOR THE FUTURE:

THE APPROXIMATE AMOUNT OF MY/OUR BEQUEST, BASED ON TODAY'S VALUE, IS \$ _____

DESIGNATION/PURPOSE OF GIFT: _____

ATTORNEY/ADVISOR NAME: _____ WORK PHONE: _____

EMAIL ADDRESS: _____

FIRM'S NAME: _____

ADDRESS: _____
STREET CITY STATE ZIP

___ I/WE PREFER THE TERMS OF THIS GIFT TO REMAIN ANONYMOUS.

SIGNATURE DATE

SPOUSE'S SIGNATURE (if applicable): DATE