



BEQUEST NOTIFICATION FORM

CONFIDENTIAL

Yes! I/We want to support the Mission of Saint Mary's Home of Erie with a bequest gift.

Thank you for planning to support the future of Saint Mary's Home of Erie! Please check any that apply. We realize that many people prefer not to reveal such personal information. Feel free to tell us only what you are comfortable sharing. You can rest assured that your information is kept confidential.

Revocable Bequest

I/We have included a bequest for Saint Mary's in my/our **Will** or **Living Trust**.

Optional: I/We anticipate that the approximate value of my/our bequest(s) will be: \$_____

Revocable Beneficiary Designation

I/We have included Saint Mary's as a beneficiary of an asset.

The asset of which Saint Mary's is a beneficiary is a: *(check all that apply)*

- Retirement plan(s) Financial or investment account(s)
 Life insurance policy(ies) Other asset(s):_____

Optional: I/We anticipate that the approximate value of my/our beneficiary designation(s) will be: \$_____

My/Our Name(s)

Title:_____ First Name: _____ M.I. _____ Last Name: _____

Title:_____ First Name: _____ M.I. _____ Last Name: _____

Street Address: _____ City, State: _____ ZIP: _____

Email: _____ Phone: _____



Estate Giving Benefactors

The Estate Giving Benefactors recognizes individuals who have invested in the future of Saint Mary's Home of Erie through deferred gifts. Donors eligible for this recognition are asked to confidentially inform us that you have made a provision for a gift to our organization in your estate plans.

May we list you as an **Estate Giving Benefactor** in Saint Mary's publications (our annual report, newsletter, and/or web site)?

Only your name(s) will be listed; no gift amount or city/state will appear.

Yes, I/we would like to be listed as an Estate Giving Benefactor!

If yes, how would you like your name(s) to appear?

No, I/we would not like to be listed. Please list my/our name as "Anonymous".

Would you like to list your gift in memory or honor of anyone?

Tribute Name: _____

This form is non-binding and does not constitute a legal promise of any future donation to Saint Mary's. We understand that bequests are revocable and that your estate plans may change.

Thank you for your planned bequest to Saint Mary's Home of Erie!

Please send this completed form to:

**Emma N. Toner
Director of Marketing and Development
Saint Mary's Home of Erie
607 East 26th Street
Erie, PA 16504**

Sponsored by the Sisters of St. Joseph of Northwestern Pennsylvania, Saint Mary's Home of Erie is non-discriminatory in admissions, services and employment. Please note: a donation to Saint Mary's Home of Erie, a 501(c) (3) organization, is purely voluntary and is tax-deductible to the fullest extent allowed by law. A contribution is not a requirement for employment; a business relationship or continuation of an existing business relationship; or a requirement for admission, expedited admission or continued stay at Saint Mary's Home of Erie. All residents will receive the same standard quality care notwithstanding any donations or contributions received. **If you wish to have your name removed from the mailing list to receive future fundraising materials supporting Saint Mary's Home of Erie, please send your request to optout@stmaryshome.org; Saint Mary's Home of Erie, Development Office, 607 East 26th Street, Erie, PA 16504; or call (814) 528-0194.** FLORIDA #CH 32789: A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800-435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE. Kansas: The official registration and annual financial report of Saint Mary's Home of Erie is filed with the Kansas Secretary of State. Kansas Registration # 449-331-8. Maryland: A copy of Saint Mary's Home of Erie's financial report is available by calling Saint Mary's Home of Erie at 814-451-1308 or writing to 607 East 26th Street, Erie, PA 16504. For the cost of copying and postage, documents and information filed under the Maryland charitable organizations law can be obtained from the Secretary of State, Charitable Division, State House, Annapolis, MD. Mississippi: The official registration and financial information of Saint Mary's Home of Erie may be obtained from the Mississippi Secretary of State's office by calling 1-888-236-6167. Registration by the Secretary of State does not imply endorsement by the Secretary of State. New Jersey: Information filed with the Attorney General concerning this charitable solicitation may be obtained from the Attorney General of the State of New Jersey by calling 201-504-6215. Registration with the Attorney General does not imply endorsement. New York: A copy of the latest annual report may be obtained from Saint Mary's Home of Erie, or the Charities Bureau, Department of Law, 120 Broadway, New York, NY 10271. The official registration and financial information of Saint Mary's Home of Erie may be obtained from the Pennsylvania Department of State by calling toll free, within Pennsylvania, 1(800)732-0999. Registration does not imply endorsement. Virginia: A financial statement is available from the State Division of Consumer Affairs. Washington: Our charity is registered with the Secretary of State and information relating to our financial affairs is available from the Secretary of State, toll free for Washington residents 800-332-4483. West Virginia residents may obtain a summary of the registration and financial documents from the Secretary of State, State Capitol, Charleston, WV 25305. Registration does not imply endorsement. Consult with the IRS or your tax professional regarding tax deductibility.

