

# Estate Giving Benefactors

## Confidential Membership Form



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. Please complete this form and mail to:

Saint Mary's Home of Erie • Development Office • 607 East 26th Street • Erie, PA 16504-2813

Name(s) \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

I/We would be pleased to be listed as member(s) of the Saint Mary's Estate Giving Benefactors to serve as encouragement for others to give. My/Our name should appear as follows:

\_\_\_\_\_

I/We prefer not to be listed as members at this time.

*The following information is optional:*

I have made the following estate provision:

- |   |  |
|---|--|
| <input type="checkbox"/> Bequest                              | <input type="checkbox"/> Securities              |
| <input type="checkbox"/> IRA or Retirement Plan Beneficiary   | <input type="checkbox"/> Personal Property       |
| <input type="checkbox"/> Life Insurance Policy Beneficiary    | <input type="checkbox"/> Charitable Gift Annuity |
| <input type="checkbox"/> Charitable Remainder Trust           | <input type="checkbox"/> Charitable Lead Trust   |
| <input type="checkbox"/> Other provisions as described below: |  |

\_\_\_\_\_

Gift Designation:

- Area of Greatest Need    Benevolent Care Fund    The Gallagher Center    Saint Mary's East  
 Saint Mary's at Asbury Ridge    Other: \_\_\_\_\_

Estimated current value \$ \_\_\_\_\_

Professional Advisor's Name (CPA, attorney, broker): \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Birth date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Birth date

Completion of this form is not intended to be legally binding; it is a good faith statement of my/our intent.

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. 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 is purely voluntary. A contribution is not a requirement for employment; the formation of 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 regardless of 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 a written request to: Saint Mary's Home of Erie, Development Office, 607 East 26th Street, Erie, PA 16504.

