

Clairvaux Society

Of St. Bernard

Inspiring the benefactors of St. Bernard to preserve the past, honor the present, and secure the future.

Bequest Intention

A bequest in your will or Trust is a simple, thoughtful, and generous way through which you can support St. Bernard Preparatory School and St. Bernard Abbey. To include St. Bernard as a beneficiary in your estate plans, please complete and return this bequest intention form. This is not a legal document. It is a way to track future bequests to St. Bernard.

I. Bequest Vehicle I have named St. Bernard as a beneficiary in my: __ Will (Please complete section II __ Trust (revocable __; irrevocable __) __ IRA \$ _____ __ Retirement Plan (Type: _____) \$ _____ __ Insurance Policy \$ _____ Company _____ Policy# _____ We would appreciate attaching any additional information (i.e., the page in which St. Bernard is mentioned in your estate plans).	II. Bequest Form I will provide for the St. Bernard in the following manner: __ A percentage of my estate (_____ %) __ A specific dollar amount \$ _____ __ The residue of my estate after other bequests __ A specific item of value (Please list item here): _____ The intended "approximate amount" of my bequest is: \$ _____ We understand that this is "only and estimate".
III. Bequest Designation I wish for my bequest to benefit St. Bernard in the following manner: __ Applied at the discretion of St. Bernard to its greatest needs. __ For the following purpose _____	IV. Bequest Recognition __ I wish to be listed in the St. Bernard annual report as a member of the Clairvaux Society, St. Bernard's planned giving recognition society. __ I wish to make my bequest confirmation anonymously

V. Personal Information

Name: _____ Spouse (If applicable): _____
Address: _____ City: _____ State: _____ Zip: _____
Home Phone: _____ Cell Phone: _____ Email: _____
Signature: _____ Date: _____

Please return to: Development Office, St. Bernard Planned Giving, 1600 St. Bernard Dr. SE, Cullman, AL 35055

www.stbernardabbey.com 256-739-6682