

# CONFIDENTIAL INTENTION FORM



Sacred Heart Southern Missions  
Walls, Mississippi

Dear Donor,

We realize that many people who plan to support Sacred Heart Southern Missions through their estate and/or financial plans prefer to keep their intentions private. However, by letting us know of your plans, we can thank you during your life, and confirm that we are able to fulfill your stated intentions.

Please know that completing this form is non-binding — we understand that you may change your plans at any time. Please also know that all information you share with us is kept strictly confidential.

Steve Koepke  
Director of Donor Relations  
Sacred Heart Southern Missions  
Phone: 888.217.4829  
Email: [skoepke@shsm.org](mailto:skoepke@shsm.org)

## Planned Gift Notification- Confidential

### Personal Information

Name: \_\_\_\_\_

Spouse Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

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

Date(s) of Birth: \_\_\_\_\_

## Your Gift Intention

Please provide the following information and attach a copy of the documentation or appropriate language from your will or trust, if available. Please complete all that apply.

- I/We want to support the mission of Sacred Heart Southern Missions through a planned gift as described below:
- I/We have included a bequest for Sacred Heart Southern Missions in my/our will or living trust.
  - I/We have named Sacred Heart Southern Missions as a beneficiary of an asset:
    - Retirement Plan
    - Bank, Investment, or Other Financial Account
    - Life Insurance Policy
    - Other: \_\_\_\_\_
  - I/We have named Sacred Heart Southern Missions as a revocable/irrevocable (*circle one*) beneficiary of a charitable remainder trust.

The anticipated value of my/our gift is/will be approximately \$ \_\_\_\_\_ or \_\_\_\_\_ % of my/our estate. *(If possible, please include a copy of the bequest language or other wording describing your planned gift.)*

Please provide a general description of the gift provision (*such as, asset to be donated if other than cash or securities, how gift is to be used, whether gift is to create an endowment, etc.*):

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- Yes, you may include me/us in listings of planned gift donors.

Please indicate how you would like your name(s) to appear in our **Faithful Companions of the Sacred Heart** listings. *(Please note the amount of your intended gift will not be published):*

- No, please do not include me/us in listings.

Signature(s):

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Date:

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Return form to:  
Steve Koepke  
Director of Donor Relations  
Sacred Heart Southern Missions  
6050 Highway 161 N, Walls, MS 38680  
Phone: 888.217.4829  
Email: [skoepke@shsm.org](mailto:skoepke@shsm.org)