



DIOCESE OF
NASHVILLE

LEGACY SOCIETY MEMBERSHIP

The Legacy Society honors those who make the Roman Catholic Diocese of Nashville a beneficiary of their estates. Donors are invited to design their own legacies and outline their future intentions. The Diocese is grateful for the witness to the Faith that these generous commitments represent.

Name(s): _____

Address: _____

Phone: _____ Email: _____

Primary association with Diocese: _____ Parish: _____

Type of gift to be received (circle one): Bequest Retirement Plan Life Insurance
Revocable (circle one): Yes No Trust Other: _____

Description of the gift to be received: _____

Estimated value of the gift based on current value of asset/estate: _____

Special conditions or contingencies: _____

Gift designations and amounts (or percentages up to 100%) per giving area: _____

Gift restrictions: _____

Recognition: News of this commitment may be shared with others: Yes No

Name(s) may be listed as follows: _____

The amount of this commitment can be shared with others: Yes No

This commitment is anonymous and should not appear on donor lists: Yes No

Additional information about my estate plan is enclosed for confirmation: Yes No

Donor Signature(s): _____ Date _____

Instructions to assist the completion of the Legacy Society Membership Form

The following descriptions are intended to help donors complete the Legacy Society Membership Form. Please contact Ashley Linville, Director of Development at the Diocese with any questions. Ashley may be reached by email: Ashley.linville@dioceseofnashville.com; phone: 615-645-9768

Name: The name(s) associated with this commitment

Address, Phone, Email: Preferred contact information

Primary association with Diocese: Please enter your main connection with the Diocese. Examples include parishioner, alumni of Diocesan school, parent of Diocesan student, Parent of Diocesan alumni, community member in the Diocese, former parishioner, relative of parishioner, University Catholic, Catholic Charities supporter, Diocesan Committee member, priest, deacon, Diocesan staff, Seminarian, Bishop.

Parish: Current parish attendance - providing this information is optional.

Type of gift to be received: This is the type of asset to benefit the Diocese. Please circle one of the options, or write the name of the asset in the option in "Other".

Revocable: Gifts that are "revocable" can be amended by donors at any time without penalty because assets have not been permanently transferred. Irrevocable gifts are ones where the asset has transferred to the charity or is in a permanent relationship that prevents the asset beneficiary from being changed.

Description of gift to be received: This includes more information about the asset such as the company name where the asset is owned or managed; or the percentage of the asset to be received. For example: "A bequest from a retirement plan at the university jointly-owned by Mr. and Mrs. Smith, and managed by Vanguard."

Estimated value of the gift based on the current value of the asset/estate. \$50,000, e.g. Any amount may be specified. It is simply an estimate and does not have to be the exact amount expected to be received in the future.

Special Conditions or Contingencies: This includes additional information such as the bequest is revocable (changeable) and the asset will pass to the surviving spouse, and then the Diocese will receive the proceeds following the death of Mr. and Mrs. Smith. "The Diocese and the parish will receive 100% of the retirement plan after both spouses are deceased."

Gift Designations and amounts per giving area: This is a chance to indicate where the gift is to be allocated, and a percentage. For example, "50% to the Diocese and 50% to my parish."

Gift restrictions: This allows the donor to specify whether there are any restrictions, and if not, indicate "No restrictions" which provide maximum flexibility for use. Preferences donors may have include "Endowment", "scholarships for schools". Please note that a member of the Development staff may follow-up to make sure that the intentions of these restrictions are clearly defined and understood. "The parish can use the gift without restriction, as can the Diocese."

Recognition: The Diocese wants to make sure that donors are recognized appropriately according to their wishes.

News of this commitment: Specific press releases or articles profiling the impact of philanthropy are two ways to share the news. Donor lists published annually are another way. Last, donors inspire others when they share news 1x1 or in a small group.

Name(s) may be listed as follows: This gives guidance on how the names of the donors should appear.

The amount of this commitment can be shared with others: Some donors do not mind the news being shared, while others prefer this information be kept private.

The commitment is anonymous and should not appear on donor lists. Choosing yes keeps the news and amount of the commitment anonymous.

Additional information about my estate is enclosed. Some donors provide charities with a portion of a bequest or other documentation that is the official record of the commitment detailed by the Legacy Society Membership form.

Donor Signature(s) and date: This confirms membership and the plan that has been outlined.
