



The Orange Catholic Foundation
 13280 Chapman Avenue, Suite 430
 Garden Grove CA 92840
 714.282.3021
 www.orangecatholicfoundation.org



**Light of Christ Legacy Society
 Legacy Gift Intention Notification**

The purpose of this notification is to summarize my/our intent to make a legacy gift in line with the mission and vision of the Orange Catholic Foundation to support all aspects of the Catholic faith in the Diocese of Orange. In prayerful response to the Lord’s call to share our living faith, I/we wish to notify you of a legacy gift that I/we have made and for which I/we wish to be recognized as a member(s) of the *Light of Christ Legacy Society*.

Name(s) _____

Home Address _____

City _____ State _____ Zip _____

Telephone Number(s): _____

Email Address(es): _____

Legacy Gift Designation:

- My/Our legacy gift is unrestricted (to be used where the need is greatest)
- Direct my/our legacy gift to benefit my/our parish _____
(Specify Name of Parish in Diocese of Orange)
- Direct my/our legacy gift to benefit _____
(Specify Name of School, Diocesan Ministry, or Program in the Diocese of Orange)
- Direct my/our legacy gift to an existing Fund at the Orange Catholic Foundation:

(Specify Name of Fund)
- Other: _____
- Please see additional instructions below regarding the purpose and administration of my/our legacy gift:
(Please attach a statement if necessary) _____

Anticipated Value:

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.)

The Orange Catholic Foundation is committed to fulfilling the objectives of the donor(s) as reflected in this legacy gift intention form. Should the purpose of this gift become obsolete, the Orange Catholic Foundation will consult with the donor(s) to find alternative ways to make use of the legacy gift for a purpose or purposes that are consistent with the original intentions of the donor(s). In the event the donor(s) is/are deceased, the Orange Catholic Foundation will use the gift for a similar purpose most consistent with the intention of the donor(s) and in accordance with the Orange Catholic Foundation’s gift acceptance guidelines.

My/Our legacy gift arrangement has been or will be made as follows:

- | | |
|--|--|
| <input type="checkbox"/> Bequest (Gift in Will or Trust) | <input type="checkbox"/> Retirement Assets Designation |
| <input type="checkbox"/> Charitable Remainder Trust | <input type="checkbox"/> Gift of Life Insurance |
| <input type="checkbox"/> Charitable Lead Trust | <input type="checkbox"/> Retained Life Estate |
| <input type="checkbox"/> Charitable Gift Annuity | <input type="checkbox"/> Property |
| <input type="checkbox"/> Beneficiary on Bank Account | |

Endowment Fund Created _____
(Endowment Fund Name)

I/We understand that this legacy gift intention is revocable and may be changed at any time. I/We further understand that I/we (and/or my estate) am/are not legally or morally obligated to fulfill this gift intention if I/we (and/or my estate) choose to modify or cancel my/our gift intention at a future date.

I/We will inform you if I/we change my/our legacy gift intention or if the value of my/our gift significantly increases or decreases.

Light of Christ Legacy Society Recognition:

- Yes, I/we give permission for the Orange Catholic Foundation to publish my/our name(s) as member(s) of the *Light of Christ Legacy Society* in various publications and other publicity materials.

For recognition purposes related to the *Light of Christ Legacy Society*, please list my/our name(s) as follows:

- I/We prefer to remain private. Please do not publish my/our names.

PRINT NAME

PRINT NAME

Signature

Signature

Date

ACCEPTED BY: _____
Orange Catholic Foundation

PRIVACY STATEMENT

The Orange Catholic Foundation is committed to protecting your privacy. We collect donor information so that we can offer personalized stewardship of your gift. We treat this information as private and confidential, and we will never disclose your data to third parties unless required by law or upon your request. We will not distribute your donor information to be used in mailing lists, surveys, or any other purpose other than what is required to perform our services.