

ST BART'S



Declaration of Intent: The Mosaic Society

St. Bartholomew's Church in the City of New York

I/We are pleased to share that St. Bartholomew's Church is a beneficiary of my/our estate plans. In making this **Declaration of Intent**, I/we understand that I/we am/are eligible for membership in **The Mosaic Society**, which recognizes those ensuring the future of our parish.

Note: This is a statement of current intent and does not constitute a legally binding obligation. It may be amended at any time.

1. Gift Provision

My/our gift is established through the following (check all that apply):

- Will or Bequest
- Living Trust
- Retirement Plan (IRA, 401k, 403b)
- Life Insurance Policy
- Charitable Gift Annuity
- Charitable Remainder or Lead Trust
- Other (*Please describe*): _____

2. Gift Purpose & Value

Designation:

All planned gifts to St. Bart's are deeply appreciated. As you consider yours, please know that unrestricted gifts are especially valuable because they provide the Church with the flexibility to meet whichever needs are most urgent at the time.

If you do prefer to designate your gift to benefit a particular program, we recommend contacting us in advance so that we may assist you with the language and ensure that your intentions are honored.

Estimated Value: *This information is strictly for long-range planning and will remain confidential.*

- **Estimated Value:** \$ _____ **OR Percentage of Estate:** _____ %

3. Recognition Preferences

- Yes**, you may include my/our name(s) as (a) Mosaic Society member(s) in traditional and electronic publications.
 - Please print name(s) as it/they should appear:*

- Anonymous**, I/we prefer to remain anonymous in all publications.

4. Contact Information

- **Name(s):** _____
- **Address:** _____
- **City/State/Zip:** _____

- **Phone:** _____ Mobile Home

5. Other Information

Please include any additional information about your gift here that you would like to share with us:

- Follow-up:** Please contact me/us to discuss the specific details of my/our gift.
 - Best way to reach me:* _____

Please return this form to:

St. Bartholomew's Church
Development Office
325 Park Avenue, New York, NY 10022

Any expression of present intention in the above may be changed by the donor at any time and creates no legally enforceable obligation.