



CONGREGATION OF ST. JOSEPH
ADVANCEMENT OFFICE
3430 ROCKY RIVER DRIVE
CLEVELAND, OHIO 44111
CSJOSEPH.ORG

Legacy Gift - Declaration of Intent

Thank you for including the Congregation of the Sisters of St. Joseph in your estate plans. We are deeply honored by your commitment. This form will help us keep accurate records and understand your preferences. Please note that this is not a binding legal document and all information will be kept in the strictest confidence. Please consult your accountant or tax attorney to determine the tax deductibility of your donation.

Your Contact Information: (please add or edit as needed)

First Name Last Name

Address

City/State ZIP

Phone Email

I have included the Congregation of the Sisters of St. Joseph in my estate plans in the following ways:

Will Trust Beneficiary: IRA Life Insurance Other _____

(Optional) Gift details (amount, percent, estate, etc.)

Anything else that you would like us to know?

Recognition Preferences

Please list my name as follows: _____

Please **do not** list my name. I prefer to remain anonymous

(Optional) My gift is in honor of _____

(Optional) My gift is in memory of _____

Signature: _____ Date: _____

To learn more or return a completed form, please contact:
Melissa Haley O'Leary, Director of Development (mailing address above), or 216-688-3474 or moleary@csjoseph.org.