



## Assisi Society Enrollment & Estate Gift Notification Form

Thank you for choosing to include the Sylvania Franciscan Foundation in your estate plans. The **Sisters of St. Francis of Sylvania, Ohio** established the **Assisi Society** to recognize and honor individuals who support their mission and ministries through planned gifts such as wills, trusts, life insurance, or other arrangements. Named for St. Francis of Assisi, the Society reflects the values and legacy that continue to guide their work.

This non-binding form confirms your gift intention and serves as a gift agreement with the Foundation. We will keep your information confidential and use it solely for planning and recognition based on your preferences.

### ESTATE GIFT NOTIFICATION

*The individual(s) below has/have included the Sylvania Franciscan Foundation in an estate plan as follows:*

#### DONOR INFORMATION

Name(s): \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Email: \_\_\_\_\_  
Date of Birth (Mo/Yr): \_\_\_\_\_ Spouse: \_\_\_\_\_

#### ESTATE GIFT INFORMATION

I/we have included the Sylvania Franciscan Foundation as a beneficiary of the following (check all that apply):

- Will or trust                       Retirement account  
 Life insurance policy       Financial or investment account  
 Other asset(s): \_\_\_\_\_

#### TRUSTEE OR EXECUTOR INFORMATION (If known; optional)

Name(s): \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

If known, the current estimated value of the gift is/will be: \$ \_\_\_\_\_ or \_\_\_\_\_ % of the estate. *(For internal planning purposes only; not legally binding)*

**Designation of Gift:**

- Unrestricted – to be used where most needed
- Restricted – to support the following purpose(s): \_\_\_\_\_

**RECOGNITION PREFERENCES**

We would be honored to recognize your gift through membership in the **Assisi Society**. Please indicate your preferences. *(Please note the amount of your intended gift will not be published):*

- Please list my/our names as: \_\_\_\_\_
- I/we prefer to remain anonymous during my/our lifetime, but permit recognition posthumously
- I/we prefer to remain fully anonymous, both during my/our lifetime and after my/our passing
- I/we would be open to being profiled in a future publication; please contact me/us

**OPTIONAL DOCUMENTATION**

- A copy of the relevant section(s) of my estate plan is attached
- I would like to be contacted to discuss a formal gift agreement

Date: \_\_\_\_\_ Donor Signature\*: \_\_\_\_\_

Date: \_\_\_\_\_ Donor Signature\*: \_\_\_\_\_

***\*This form is non-binding***

Thank you again for your support of the **Sisters of St. Francis of Sylvania, Ohio**, and for sharing your estate plans with us. We track the total number of intended planned gifts (anonymously) to help with long-term planning and to inspire others to consider a similar legacy. By notifying the **Sylvania Franciscan Foundation** of your gift, you help us grow future support for the Sisters' mission and ministries.

Please return this form to:

**Nate Reid, CFRE**  
Executive Director  
Sylvania Franciscan Foundation  
6832 Convent Blvd  
Sylvania, OH 43560  
Phone: (419) 824-3625  
Email: nreid@sistersosf.org

*The information on this form is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor.*