



NOTRE DAME

HERITAGE CIRCLE – MAKING YOUR LEGACY GIFT

Notre Dame Preparatory and Marist Academy is honored that you are considering a bequest or planned gift to the school. This form records your purpose and commemorates your intent to leave a portion of your estate to NDPMA, or to engage in a gift using a financial instrument other than cash. There are many ways to make a gift, and we are grateful that you have found the school a worthy beneficiary of your philanthropy.

NDPMA has established the *Heritage Circle* as a way to recognize the generosity of those who choose to remember us with a planned gift or bequest. Inspired by the example of Mary, whose nurturing spirit and selfless actions provided for the development of Jesus and His ministry, the *Heritage Circle* seeks to provide lasting and sustainable support for excellence in Catholic education at NDPMA.

A “planned gift” is a term that is meant to describe gifts to charitable organizations that are pledged as part of a larger financial plan, many of which provide tax-benefits and can even help in some cases to resolve certain tax issues for the donor or his/her heirs. Your commitment will enable NDPMA to plan for programs, curricula, and physical improvements to the school for years to come and will have a profound influence on future generations of students.

Please fill out the lower section of this form for our records. This will serve as official documentation of your intent to make a bequest or planned gift as part of your financial plans. If you would like further information, please contact Robynn James at (248) 373-2171 ext. 8, or by email at rjames@ndpma.org.

In filling out this form I intend to officially inform Notre Dame Preparatory School and Marist Academy, its officers, administrators, trustees and auditors that I/we have remembered NDPMA in our estate and/or financial plans through one or more of the following methods (check all that apply):

- | | |
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| <input type="checkbox"/> Will or Bequest | <input type="checkbox"/> Gift of Real Property or Personal Property ¹ |
| <input type="checkbox"/> Living Will or Irrevocable Trust | <input type="checkbox"/> Closely Held Stock |
| <input type="checkbox"/> Retirement Assets or IRA rollover | <input type="checkbox"/> Appreciated Securities |
| <input type="checkbox"/> Charitable Remainder Trust | <input type="checkbox"/> Donor Advised Fund/Private Foundation |

I/we _____ (print name), acknowledge that we derive no benefit, gifts or services in exchange for this gift. I/we hereby affirm our intent to make this gift solely for the benefit of NDPMA and its mission: “*With God, we form Christian people, upright citizens and academic scholars.*”

Signature(s)

Date

¹ Please contact the Advancement Office for a copy of our Gift Acceptance Policy.