



CONFIDENTIAL

HOLY CROSS COLLEGE

at Notre Dame, Indiana

CONFIDENTIAL STATEMENT OF ESTATE GIFT

ESTATE GIFT CONFIRMATION

If you have made - or would like to make - an estate gift to Holy Cross College, please take a moment to complete the form below and return it to us.

Name

Spouse Name

Address

City

State

Zip

Phone

Email

- ☐ I/We have named the Holy Cross College as a beneficiary in one or more:
☐ I/We would like to learn about naming the Holy Cross College as a beneficiary in one or more:

- | | |
|--|--|
| <input type="checkbox"/> Will | <input type="checkbox"/> IRA, pension, or other retirement account |
| <input type="checkbox"/> Charitable Remainder Trust* | <input type="checkbox"/> Other Trust (living, lead trust, etc.) |
| <input type="checkbox"/> Donor Advised Fund* | |
| <input type="checkbox"/> Other (please specify): | _____ |

Approximate amount of gift: _____

Gift designation (if any): _____

Comments: _____

Signature: _____ Date: _____

I/we understand that by completing this form, my/our estate is not legally bound by this statement, and I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion.

JOIN THE SAINT SIMEON SOCIETY: Holy Cross would be honored to enroll you in the Saint Simeon Society. The Society recognizes donors who've made Holy Cross College a meaningful part of their legacy through planned giving.

* Held at institution other than Holy Cross