

SAINT CECILIA PARISH

DECLARATION OF FUTURE INTENT

Thank you for your intention to include Saint Cecilia Parish in your estate plan. To accurately document your intention, please complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation.

RECOGNITION OF YOUR GIFT

For recognition purposes, please list my/our name(s) as follows:

Please do not include my/our name in any public listings of donors.

I/We wish for my/our gift intention to be confidential and anonymous, publicly and in your records.

Briefly describe allocation, designation, and how your gift should be used:

Description and Value of Gift - Please indicate below (by checking applicable options), how your future gift intention will be fulfilled and provide the current estimated value:

Description

Estimated Value of Gift

Will or Trust _____

Charitable Gift Annuity _____

Charitable Remainder Trust _____

Remainder of Retirement Fund/IRA _____

Life Insurance Policy _____

Other Item or Asset _____

Please describe (for example, private collections, real estate, securities, etc.):

Beneficiary – If Saint Cecilia Parish is only a contingent beneficiary, please explain conditions.

Documentation - Please provide us with copies of any documents (or the relevant pages) that include provisions for Saint Cecilia Parish.

CONTACT INFORMATION

Will or Trust – If your gift is included in a will or trust, please provide the following:

Executor(s) or Trustee(s)

Name and Address

Phone and/or Email

Beneficiary Designation – If your gift is directed by a beneficiary designation, please provide the following:

Administrator or Company

Name and Address

Phone and/or Email

Other Information, Contacts and Relationships You Want Us to Know (family, attorney, etc.)

Name and Address

Phone and/or Email and Relationship

This Declaration of Intent enrolls you in The Catholic Legacy Society.

New Intention – This is a new bequest intention.

Update to Intention – This is an update to a previously recorded bequest intention to Saint Cecilia Parish.

Signature

Date

Signature

Date

Print Name

Print Name

Street Address

Street Address

City, State, Zip

City, State, Zip

Email and Phone Number

Email and Phone Number

Attached is preferred language for bequests, which may be helpful to you in preparing your documents.

Please send this form (together with copies of any relevant documents) to:

Colleen Melaugh, Director of Finance

**Saint Cecilia Parish
18 Belvidere Street
Boston, MA 02115**

With a copy to:

**Lisa Lipsett, Esq., Executive Director
Catholic Community Fund of the Archdiocese of Boston
66 Brooks Drive | Braintree, MA 02184
(617-746-5693)**

Sample Bequest Intention Language

NOTE: Parishes and many Catholic schools and ministries have formal legal status under Church Law (Canon Law), but do not have independent status under the Civil Law of the Commonwealth of Massachusetts. The appropriate civil legal entity to receive bequests for Saint Cecilia Parish is the Roman Catholic Archbishop of Boston, a Corporation Sole, organized and existing in accordance with Chapter 506 of the Massachusetts Acts of 1897. Boston’s Archbishop, Cardinal Seán O’Malley, OFM Cap, is charged by Canon Law with seeing that bequests to all entities related to the Archdiocese of Boston are handled to assure that the bequests of the deceased are fulfilled in all respects.

1 OUTRIGHT BEQUEST

a) Specific Dollar Amount

“I give the sum of \$_____ to the Roman Catholic Archbishop of Boston, a Corporation to be used for the benefit of Saint Cecilia Parish, 18 Belvidere St., Boston, MA 02115.”

b) Specific Property

“I give all my right, title and interest in and to <description of property> to the Roman Catholic Archbishop of Boston, a Corporation Sole, to be used for the benefit of Saint Cecilia Parish, 18 Belvidere St., Boston, MA 02115.”

c) Share of, or Entire Residue, of Estate

“I give (all/or _____%) of the residue of my estate to the Roman Catholic Archbishop of Boston, a Corporation Sole, to be used for the benefit of Saint Cecilia Parish, 18 Belvidere St., Boston, MA 02115.”

2 CONDITIONAL BEQUEST

Insert conditional language in the above provisions. For example:

“If my husband/wife does not survive me, I give the sum of \$_____ to the Roman Catholic Archbishop of Boston, a Corporation Sole to be used for the benefit of Saint Cecilia Parish, 18 Belvidere St., Boston, MA 02115.”

3 RESTRICTIONS

If the gift is for a purpose other than an unrestricted use, insert the restriction. For example:

“I give the sum of \$_____ to the Roman Catholic Archbishop of Boston, a Corporation Sole, for the following use and purpose: <describe use/purpose> at Saint Cecilia Parish, 18 Belvidere St., Boston, MA 02115.”

4 FLEXIBILITY CLAUSE

Please add the following language to all bequests:

“If, in the judgment of the Roman Catholic Archbishop of Boston, a Corporation Sole (the “Archdiocese”), it becomes impossible to accomplish the purposes of this gift, the income and/or principal may be used for such related purposes and in such manner as determined in the sole discretion of the Archdiocese.”

5 LANGUAGE FOR HAVING MASSES CELEBRATED

a) Specific Number of Masses at a Particular Church

“I give the sum of \$_____ to the Roman Catholic Archbishop of Boston, a Corporation Sole, for the benefit of Saint Cecilia Parish, 18 Belvidere St., Boston, MA 02115 for <specific number of> Masses to be celebrated over <number of> years after my death, for the repose of my soul <or other person or purpose>.”

b) Annual Masses Over a period of Years

“I give the sum of \$_____ to the Roman Catholic Archbishop of Boston, a Corporation Sole, to be used for the benefit of Saint Cecilia Parish, 18 Belvidere St., Boston, MA 02115 for annual Masses over a period of <number of years not to exceed 25> years to be celebrated for <purpose>.”

NOTE: If you want the parish to have access to all the funds right away, also state: "It is not my intention to create a non-autonomous pious foundation or trust of any sort in canon law or civil law." Otherwise, the parish will not receive the principal amount until all the requested Masses have been celebrated.

6 ADDITIONAL INFORMATION

The Federal Tax ID for the Roman Catholic Archbishop of Boston, a Corporation Sole is 04-2106175. The address is 66 Brooks Drive, Braintree, MA 02184.

We advise you to review this language with your own independent legal counsel. This language is not provided as legal or financial advice. Please discuss these issues with your own, independent legal counsel.
