

## Joining the Legacy Society

Our Legacy Society recognizes all those who have notified us that they have included the Educational Trust Fund at St. Francis of Assisi in their will or other deferred giving plan.

There are two steps to join:

**Step One:** Arrange your estate to leave a gift to the Educational Trust Fund. Common ways to do this are:

- A bequest through your will or trust
- A designation of all or a portion of your retirement assets
- A life insurance policy beneficiary designation
- A charitable gift annuity
- A charitable remainder trust
- A charitable lead trust

We also recommend you discuss these options with your family and with your attorney, accountant, insurance agent, or financial planner as may be appropriate.

**Step Two:** Inform the Educational Trust Fund Board of Trustees that you have made the necessary arrangements by returning the form below.

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### ST. FRANCIS EDUCATIONAL TRUST FUND

2150 Frieze Ave.  
Ann Arbor, MI 48104  
Phone: 734-821-2208  
Fax: 734-821-2102

E-Mail: [developmentoffice@stfrancisa2.org](mailto:developmentoffice@stfrancisa2.org)

### The Legacy Society Enrollment Form

I/We have made a provision for the St. Francis Educational Trust Fund in a manner explained in **Step One** above and wish to be included in the Legacy Society. I/We agree to be included in published listings of the Society's members.

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Please print name(s) below as you wish to be listed:

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Signature

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Date

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Signature

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Date