



## Legacy Society

### Deferred Gift Disclosure

I/We, \_\_\_\_\_, intend to make a gift to The Basilica Landmark, Minneapolis, Minnesota, as a part of my/our estate plan.

This gift is identified in a:

- Will/Trust dated \_\_\_\_\_
- As a beneficiary of my IRA or other retirement plan
- As a beneficiary of an insurance policy on the life of \_\_\_\_\_

This gift is in the amount of:

- \$ \_\_\_\_\_ (please enter specific dollar amount)
- A percentage of my estate, currently equal to approximately \$ \_\_\_\_\_
- The remainder of my estate, currently equal to approximately \$ \_\_\_\_\_  
(Please note the amount is kept confidential and used only for planning purposes.)

I/We understand that by stating an amount 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.

Print Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Signature: \_\_\_\_\_ Today's Date: \_\_\_\_\_

To leave a bequest to The Basilica Landmark please provide the following suggested language to your legal counsel or administrator of your retirement fund:

**“I, [name], of [city, state, zip code], give to The Basilica Landmark (Tax ID # 41-1754864), 88 N 17<sup>th</sup> St, Minneapolis, MN 55403, [specific amount or percentage of the estate or description of property]. To ensure that your gift is properly directed, please make sure you name “The Basilica Landmark” *not* “The Basilica” or “The Basilica of Saint Mary.”**

**Thank you for including The Basilica Landmark in your estate plans and welcome to the Landmark Legacy Society!**

- Please feel free to publish my name in Legacy Society donor lists. I would like to be recognized as \_\_\_\_\_.
- I wish to remain anonymous. Please do not publish my name.
- Although my/our gift is anonymous, please include me/us in invitations to Legacy Society events.

88 N 17<sup>th</sup> Street, Minneapolis, MN 55403. PHONE: 612.317.3421. FAX: 612.371.9776

[www.thebasilicalandmark.org](http://www.thebasilicalandmark.org)