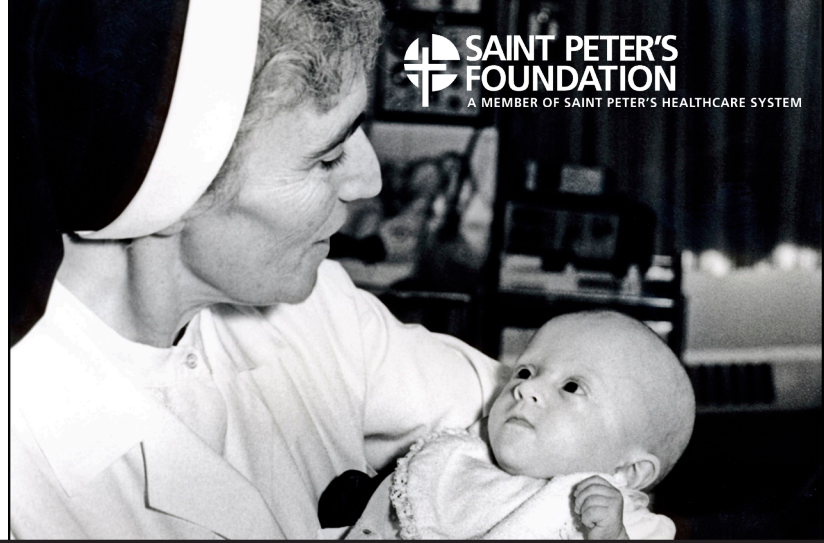


# LEAVE A LEGACY

PLANNED GIVING



## Sister Marie de Pazzi Legacy Society

By making long-range, planned gifts, individuals who join the *Sister Marie de Pazzi Legacy Society* support Saint Peter's Healthcare System by ensuring its vitality in providing philanthropy for competent and compassionate medical care for years to come. Participation in the Legacy Society builds upon a mission that spans more than a century. By honoring the history and memory of Sister Marie de Pazzi, Legacy Society members play a role in the future of Saint Peter's.

Members of the *Sister Marie de Pazzi Legacy Society* receive invitations to exclusive Healthcare System programs/events and if they grant permission, can be recognized for their generosity in Saint Peter's Foundation publications.

**Individuals may join the *Sister Marie de Pazzi Legacy Society* by informing Saint Peter's Foundation that arrangements have been made for one of the following gifts\*:**

- *A bequest to Saint Peter's Foundation in a "will" or through a "revocable trust"*
- *Participation in a life income arrangement for the benefit of Saint Peter's Foundation (for example, a charitable remainder trust or charitable lead trust)*
- *The naming of Saint Peter's Foundation as a beneficiary of a retirement plan or a life insurance policy*
- *A gift of real estate*

*\*Gifts in any of these forms may be made in memory or honor of family and friends.*

*To discuss Sister Marie de Pazzi Legacy Society membership, please contact:  
James Choma, Vice President for Catholic Mission and Chief Development Officer  
[jchoma@saintpetersuh.com](mailto:jchoma@saintpetersuh.com) or 732.745.8581*

# LEAVE A LEGACY

PLANNED GIVING



## Sister Marie de Pazzi Legacy Society

### Planned Gift Intention Form

To demonstrate my/our commitment to support continued efforts for the growth and sustainability of Saint Peter's Healthcare System, I/we have made charitable provisions for Saint Peter's Foundation in my/our estate plans.

NAME(S): \_\_\_\_\_  
 BIRTHDATE(S): \_\_\_\_\_  
 ADDRESS: \_\_\_\_\_  
 CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_  
 PHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

Please indicate your type(s) of planned gift below. *Optional: Please provide information noted in italics. Completion of this form is not intended to be legally binding, but notification of intent.*

Planned Gift Option	Percentage/Dollar Amount (optional)	Primary Beneficiary/Contingent Beneficiary/Name of Provider for Endowment/Charitable Gift Annuities/Donor Advised Funds
Bequest in my/our will		
Trust		
Retirement Plan Beneficiary		
Life Insurance Beneficiary		
Family Foundation Beneficiary		
Endowment of Donor Advised Fund (name of provider)		
Charitable Gift Annuity (name of provider)		
Other (real estate, land, business, securities, etc.)		

# Sister Marie de Pazzi Legacy Society

## Planned Gift Intention Form

Estimated value of your planned gift (optional): \_\_\_\_\_

Name and phone number of attorney or financial advisor (optional):  
\_\_\_\_\_

### SAMPLE BEQUEST LANGUAGE

*"I give, devise, and bequeath to Saint Peter's Foundation, a non-profit corporation, \_\_\_\_\_  
(insert a sum or percentage of your estate) as an unrestricted gift."*

**All information provided will be kept in the strictest confidence and used for internal planning only.**

Legal Name: Saint Peter's Foundation

Address: 254 Easton Avenue, New Brunswick, NJ 08901

Tax ID #: 22-2329197

### SISTER MARIE DE PAZZI LEGACY SOCIETY

*The Sister Marie de Pazzi Legacy Society honors those who have designated a charitable gift to Saint Peter's Foundation as part of their estate planning. Recognition includes invitations to exclusive Healthcare System programs/events and acknowledgment in Saint Peter's Foundation publications. Please note your name(s) exactly as you wish them to appear or notate if you would like your gift to remain anonymous.*

NAME(S): \_\_\_\_\_

\_\_\_\_ I/we prefer to make this planned gift anonymously.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Please return this completed form and address any questions to:**

James Choma

Vice President for Catholic Mission and Chief Development Officer

Saint Peter's Foundation

254 Easton Avenue, New Brunswick, NJ 08901

jchoma@saintpetersuh.com | 732.745.8581

*\*Completion of this form is not intended to be legally binding but notification of intent. Please discuss your planned giving intentions with your attorney or financial advisor. Saint Peter's Foundation is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code. Contributions are deductible as allowed by law.*

*Planned gifts will be used at the discretion of the organization and may be used in a match fund, capital campaign or endowment. Unless your planned gift is specifically restricted, Saint Peter's Foundation's executive leadership team will determine the best use of your generous contribution.*