Cornerstone Friends

LEGACY INTENTION FORM

Please complete this form to document your planned gift. Knowing your intentions helps Parish of the Epiphany plan for the future. Your intent enrolls you as a member of the Cornerstone Friends. Thank you!

Name(s) _____

Address _____

City _____ State _____ Zip Code _____

Phone _____ E-mail _____

Gift Description:

□ Will □ Trust □ Annuity □ Donor Advised Fund

□ Life Insurance □ IRA or Retirement Plan □ Real Estate

□ Other: _____

Notes/Additional Information: _____

Optional: Today's value of my future gift provision is approximately $_____ with the understanding that future fluctuations/changes in the market/economy may have an impact on this current value.

□ Optional: Enclosed is a copy of the relevant section of my will/trust/beneficiary form which will be held in strict confidence.

Name of estate planning advisor (Attorney, CFP, other): _____

□ Name(s) may be included in Parish of the Epiphany and Cornerstone publications or listings.

Please use the following name(s) in all publications: _____

□ I/we wish to remain anonymous.

Signature _____ Date _____

Signature _____ Date _____

For questions, please contact: planned-giving@3crowns.org

781-729-1922 | www.epiphanywinchester.org | 70 Church Street, Winchester, MA 01890

Legal Name: The Parish of the Epiphany; Tax I.D. Number: 042146060