

STATEMENT OF INTENT for a Future Gift



1821 Jackson Street † PO Box 3379 † Sioux City, IA 51104
(712) 255-7933 † www.scdioocese.org

As evidence of my/our desire to provide a legacy of support for the Diocese of Sioux City, I/we hereby inform that I/we have made provision for a gift to the Diocese in my/our estate plan.
I /we understand that this commitment is revocable and can be modified by me/us at any time.

Name _____ Birthdate _____
Name _____ Birthdate _____

DESCRIPTION OF GIFT (Type/Value)

- An outright bequest upon the passing of the donor, or the passing of the donor and their spouse;
- A trust agreement, with the Diocese of Sioux City as a beneficiary;
- A life insurance policy with the Diocese of Sioux City as a beneficiary;
- A retirement plan with the Diocese of Sioux City as a beneficiary;
- Charitable Gift Annuity
- Stock
- Commodity
- Real Estate/Farmland (attached is copy of the deed for each parcel of property gifted)
- Other (please specify) _____

The estimated value of our gift is \$ _____

It is our wish that the gift be used:

- Unrestricted (Diocesan General Fund - most useful type of bequest, allowing funds to be used where need)
- Restricted, for the following fund(s):

<input type="checkbox"/> Bishop’s Circle	<input type="checkbox"/> St. Joseph Education Society	<input type="checkbox"/> Catholic School Foundation
<input type="checkbox"/> Hispanic Ministries	<input type="checkbox"/> Priest Welfare Fund	<input type="checkbox"/> Bishop’s Education Fund
		<input type="checkbox"/> Bishop’s Dinner for Catholic Schools

I/We have provided to the Diocese of Sioux City the most current, legal copy of the portion of my/our will(s) or estate plan which pertains to the Diocese of Sioux City. With the understanding that values are subject to change.

Give, and gifts will be given to you. Luke 6:38

*The information presented above is not offered as legal or tax advice.
You are urged to seek the advice of your tax advisor, attorney, and/or financial planner to make certain any gift you are considering fits in your specific circumstances.*