



# St. Ignatius School

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## Planned Giving

### Leave Your Legacy. Join the Ignatian Legacy Society.

The Ignatian Legacy Society ensures that St. Ignatius School continues to empower students in the South Bronx for generations to come. Making a planned gift to the school not only allows you to manage your assets and meet your financial needs during your lifetime, but it may also provide a tax deduction for your estate. We encourage you to consult your financial advisor to learn more about the various ways you can leave a lasting legacy at SIS.



There are many ways to give, including:

- Gift by Will: Include St. Ignatius School in your will and leave a lasting legacy that supports our mission for years to come.
- Retirement Account or Life Insurance Policy: Name St. Ignatius School as a beneficiary of your retirement account or life insurance policy, providing a meaningful gift that costs you nothing during your lifetime.
- IRA Rollover: If you're 70 ½ or older, you can make a gift directly from your traditional IRA during your lifetime. Qualified Charitable Distributions (QCDs) can provide a tax-efficient way for you to fulfill your Required Minimum Distribution (RMD) while supporting St. Ignatius School.
- Charitable Remainder Unitrust or Annuity Trust: Under new legislation, you may make a one-time-only \$50,000 QCD to St. Ignatius School to create a life income gift in the form of a qualified Charitable Remainder Unitrust or Annuity Trust.

*“If you show someone else love or kindness, they might just end up doing the same for someone else, creating a chain of doing the right thing.” - Grace O., SIS ‘18*

If you have any questions or already included SIS in your estate plans, we ask that you share your intention with us. Please contact the Advancement Office at (718) 861-9084 or [advancement@sis-nativity.org](mailto:advancement@sis-nativity.org)



## **Ignatian Legacy Society: Planned Giving Letter of Intent**

*All information provided below will be treated strictly confidentially, used for Saint Ignatius School's internal purposes only, and is not considered a legal or financial obligation.*

Saint Ignatius School recognizes all those making long-term provisions for it or any of its programs as members of its Ignatian Legacy Society.

**Please complete:**

Print Name/s: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

**Type of Gift:**

As an indication of my/our support for **Saint Ignatius School** or one of its programs, I/we are pleased to confirm that I/we have made a provision for Saint Ignatius School as follows (**select all that apply**):

- Bequest in my/our Will
- Provision in my/our Revocable Living Trust
- Establishment of a Charitable Remainder Trust
- Establishment of a Charitable Gift Annuity
- Beneficiary Designation in my/our Qualified Retirement Plan or Commercial Annuity
- Life Insurance Gift
- Other (please specify) \_\_\_\_\_

**My future gift:**

- Is a percentage of my estate and is worth approximately \$ \_\_\_\_\_
- Is in the specific amount of \$ \_\_\_\_\_

**Recognition:**

- I would like this commitment to be recognized in the following manner:

\_\_\_\_\_  
(example: Mr. and Mrs. [First Name] [Last Name] or Ms. [Name] in memory of her father, Jack.)

- I would like to remain anonymous

**SIGNATURE:** \_\_\_\_\_

**PRINT NAME:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

*Please return this form via email to [advancement@sis-nativity.org](mailto:advancement@sis-nativity.org) or the mailing address below.*

**THANK YOU FOR YOUR GENEROUS SUPPORT!**

Saint Ignatius School | 740 Manida Street | Bronx, NY 10474  
718.861.9084 | [www.sis-nativity.org](http://www.sis-nativity.org) | [advancement@sis-nativity.org](mailto:advancement@sis-nativity.org)