



Estate Gift Confirmation Form

Thank you for documenting your intention to make a gift from your estate to the Society of St. Vincent de Paul – Madison. We want to properly honor your leadership and generosity.

This is to confirm that I/We have named the Society of St. Vincent de Paul – Madison as a beneficiary of our estate as described below.

Name of Donor 1: _____ DOB: _____
Name of Donor 2: _____ DOB: _____

Gift type: ___ Will Provision ___ Living Trust Provision ___ Charitable Remainder Trust
___ Recommendation from a Donor Advised Fund ___ Life Insurance
___ Retirement Plan ___ Other _____

A good faith estimate of the **current value** of my/our bequest to the Society of St. Vincent de Paul – Madison is: \$ _____ (Optional)
This is stated as a: ___ Specific Dollar Amount ___ A Percentage ___ % (Optional)

The Society of St. Vincent de Paul – Madison will receive this gift:
___ Upon my death ___ Upon the death of both me and my spouse/partner
___ Other: _____

Designation:
___ St. Vincent de Paul – Madison’s greatest needs (unrestricted)
___ My/our bequest is to be used in accordance with a signed gift agreement on file with St. Vincent de Paul – Madison. (Contact Eric Fleming, Director of Development at St. Vincent de Paul – Madison in obtaining and/or completing these forms.)

Executor/Personal Representative/Family Member:
(This is someone whom St. Vincent de Paul – Madison may contact in the event of your passing.)
Name: _____ Relationship: _____
Phone: (____) ____ - _____ Email: _____

It is my/our intention that this estate gift confirmation form is intended to amend and revoke any and all previous estate gift confirmation forms.

Signature Date Signature Date

*St. Vincent de Paul – Madison recognizes that this gift is subject to change depending on personal and economic circumstances. This form is **non-binding** and any information you provide will remain confidential.*



Estate Gift FAQs

What is an “Estate Gift?”

An “estate gift” is a gift that St. Vincent de Paul – Madison will receive only after your death, or the death of you and your spouse/partner. It may come through a provision in your will or living trust, or it may come from a retirement plan, life insurance policy or commercial annuity in which you have named St. Vincent de Paul – Madison as a beneficiary.

Why make an estate gift rather than make a gift during life?

Making a gift from an estate often enables donors to make the gift they dream of making but, due to family, retirement, or other related financial needs, are unable to make during their lifetime.

How do I determine the value of my estate gift intention?

If your gift will be a percentage of your estate, rather than a specific amount, St. Vincent de Paul – Madison would appreciate receiving a good faith estimate of the value of the gift intention as of the current date.

What happens if my estate shrinks and cannot fulfill my intended commitment?

An estate gift intention is not legally binding. If your estate is unable to fulfill your intended commitment, we will accept whatever remaining funds, if any, are earmarked for St. Vincent de Paul – Madison.

Why does St. Vincent de Paul – Madison want to know about the estate gift I am planning?

There are many reasons why St. Vincent de Paul – Madison appreciates knowing about your estate gift commitment.

- Most importantly, these types of gifts are often the embodiment and reflection of your goals and values and, as such, have great meaning. We want you to know how much we appreciate your commitment and be able to thank you while you are living for making such a thoughtful commitment to St. Vincent de Paul – Madison.
- St. Vincent de Paul – Madison wants to be able to assure you that your gift can be used for the purpose you have designated.
- Your gift can be a wonderful inspiration to others, who may not be aware of the magnitude of the impact an estate gift can make, inspiring them to make an estate gift of their own.
- Estate gifts are often the greatest source of gifts to St. Vincent de Paul – Madison. Informing St. Vincent de Paul – Madison of your estate gift intention enables the organization to have a better understanding of these potential future gifts, as we plan for the future.

May I designate my estate gift for a specific purpose?

While unrestricted estate commitments allow St. Vincent de Paul – Madison to use your gift where the need is greatest, you may designate your estate gift to a specific program or need. If you choose to designate your estate gift, please contact Eric Fleming, Director of Development, at St. Vincent de Paul – Madison and he'll work with you to ensure that your wishes can be honored.