

*Caritas Christi*  
SOCIETY

Continuing the Legacy of Christ Through Charity

ESTATE GIFT CONFIRMATION

If you have made an estate gift commitment to Catholic Charities, please complete and return this form.

CONFIDENTIAL

Name \_\_\_\_\_ Spouse's Name \_\_\_\_\_

Address \_\_\_\_\_

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

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

I/We have named Catholic Charities of Eastern Oklahoma as a beneficiary in one or more of these types of gifts:

- |  |  |
|--|--|
| <input type="checkbox"/> Will                  | <input type="checkbox"/> IRA, pension, or other retirement account         |
| <input type="checkbox"/> Life insurance policy | <input type="checkbox"/> Charitable Remainder Trust                        |
| <input type="checkbox"/> Donor Advised Fund    | <input type="checkbox"/> Other Trust (living, charitable lead trust, etc.) |
| <input type="checkbox"/> Codicil to a Will     | <input type="checkbox"/> Other (please speci-                              |

fy): \_\_\_\_\_

Your date of birth: \_\_\_/\_\_\_/\_\_\_ Your spouse's date of birth: \_\_\_/\_\_\_/\_\_\_

Approximate amount of planned gift: \_\_\_\_\_

Purpose of gift:  To carry out the mission (where the need is greatest)

Other purpose (please specify): \_\_\_\_\_

Catholic Charities has my permission to publish my name in the Caritas Christi Society membership list. (If you check "No" your listing will be "Anonymous".) Please check: Yourself:  Yes  No Spouse:  Yes  No

Comments: \_\_\_\_\_

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

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

*Thank you for making this lasting commitment to provide charity to people in need of our compassion. Catholic Charities of Eastern Oklahoma will follow your instructions and will maintain confidentiality regarding the specifics you provide about your gift plan. In order to substantiate your gift intentions, we ask you to provide a letter from your attorney or other professional advisor with copies of supporting documents. If you have any questions, please contact us at (918) 508-7116.*

