



CISTERCIAN MEMORARE SOCIETY



Thank you for designating a planned gift to Cistercian. In an effort to properly record your intentions, we ask that you fill out this information sheet for our files.

Name: _____

I/We have included Cistercian:

- as a beneficiary in my/our will or living trust
- as a beneficiary of a life insurance policy
- as a beneficiary of a retirement plan or other investment account
- as a remainder interest owner of a personal residence or farm, with a life estate reserved
- as a beneficiary of one of the following life income agreements:
 - Charitable Lead Trust
 - Charitable Remainder Trust
 - Charitable Gift Annuity
- other _____

Estimated value of gift \$ _____ **(optional)**

How would you like your name to be listed in the Memorare Society listing or is this gift to be anonymous? _____

Please indicate the specific area of the School and/or Abbey that will benefit from your gift:

- Please allow the Abbot to allocate my gift according the greatest need of the Abbey or School
Note: Gifts to be allocated by the Abbot are initially deposited to the Our Lady of Dallas Cistercian Abbey account and then distributed in accordance with his decision.

School

- Scholarships
- Faculty Enrichment
- Facilities

Abbey

- Needs of the Monks: healthcare for elderly, education for young ones
- Abbey Church and Facilities

As Cistercian begins to tell the stories of some of its Memorare members, I/we would/would not (please circle one) be interested in sharing my/our story of why this planned gift to the Memorare Society is important.

Signature(s) _____

Date _____

Thank you. The information provided on this sheet will be held in the strictest confidence and will be utilized only for the purposes expressed. Please return the completed form to the Office of Development, 3660 Cistercian Road, Irving, TX 75039. If you have any questions, please call Erin Hart, Director of Development at (469) 499-5406.