



Confidential Letter of Intent

Name : _____

Address: _____

Telephone: (_____) _____

E-mail _____

I/We would like to support the mission and vision of St. James – St. Leo Catholic Community with a legacy gift. My gift is in the form of:

_____ A BEQUEST

The Pastor of St. James Catholic Parish, Solana Beach, CA a corporate sole Federal tax ID #27-3961078 is named as a beneficiary in my/our will or living trust dated:

_____ (or codicil, dated: _____).

I/We estimate that the approximate value of my/our bequest(s) provision will be:
\$_____.

The provision is made with the following intention:

- | | |
|---|------------------------|
| _____ Life Insurance Designation | Estimated Value: _____ |
| _____ Gift of Retirement Plan Assets | Estimated Value: _____ |
| _____ Gift of Pooled Income Fund | Estimated Value: _____ |
| _____ Gift Annuity | Estimated Value: _____ |
| _____ Charitable Trust | Estimated Value: _____ |
| _____ Living/Testamentary Trust | Estimated Value: _____ |
| _____ I have provided for St. James Catholic Parish in a manner different from above
(Please describe) _____ | |

_____ I would appreciate a visit with a financial officer of St. James – St. Leo Catholic Community or member of the congregation to assist me in better understanding how I can make a planned gift to St. James.

Signature _____ Date _____

Please complete the information requested and return to: Deacon Peter Hodsdon St. James – St. Leo Catholic Community, 625 S. Nardo, Solana Beach, CA 92075. Please feel free to contact Deacon Peter directly at Hodsdon at 858.755.2545 X *112 or at deaconpeter@stjames-stleo.org