



Cornerstone  
Society

## LEGACY INTENTION FORM

Please complete this form to document your planned gift. Knowing your intentions helps Parish of the Epiphany plan for the future. Your intent enrolls you as a member of the Cornerstone Society. Thank you!

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

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

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

### Gift Description:

- Will                       Trust                       Annuity                       Donor Advised Fund  
 Life Insurance            IRA or Retirement Plan    Real Estate  
 Other: \_\_\_\_\_

Notes/Additional Information: \_\_\_\_\_

Optional: Today's value of my future gift provision is approximately \$\_\_\_\_\_ with the understanding that future fluctuations/changes in the market/economy may have an impact on this current value.

Optional: Enclosed is a copy of the relevant section of my will/trust/beneficiary form which will be held in strict confidence.

Name of estate planning advisor (Attorney, CFP, other): \_\_\_\_\_

Name(s) may be included in Parish of the Epiphany and Cornerstone publications or listings.

Please use the following name(s) in all publications: \_\_\_\_\_

I/we wish to remain anonymous.

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

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

**For questions, please contact:** [planned-giving@3crowns.org](mailto:planned-giving@3crowns.org)  
781-729-1922 | [3crowns.org](http://3crowns.org) | 70 Church Street, Winchester, MA 01890

Legal Name: The Parish of the Epiphany; Tax I.D. Number: 042146060