

**Archdiocese for the Military Services, USA**

SERVING THOSE  
WHO SERVE



**Estate Plan Intention & Designation Form**  
***Non-Binding & Confidential***

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Preferred Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

**I am pleased to inform you that my:**

\_\_\_ Will \_\_\_ Trust \_\_\_ Retirement Plan \_\_\_ Life Insurance \_\_\_ IRA \_\_\_ Other

**includes a provision for the Archdiocese for the Military Services, USA.**  
*(Copies of supporting documents may be attached but are not required)*

**Gift Designation:**

\_\_\_ Archdiocese for the Military Services, USA (*Area of Greatest Need*)  
or  
\_\_\_ Designated Area: \_\_\_\_\_

*In honor of:* \_\_\_\_\_

***To help the Archdiocese for the Military Services, USA, plan for the future:***

The approximate amount of my/our bequest, based on today's value is

\$ \_\_\_\_\_ OR anticipated range of \$ \_\_\_\_\_ to \$ \_\_\_\_\_  
Initials

Anything else you would like the AMS to know: \_\_\_\_\_

\_\_\_\_\_  
Signature of Benefactor

\_\_\_\_\_  
Date

Attorney/Advisor Name (Print): \_\_\_\_\_ Phone: \_\_\_\_\_

\_\_\_\_\_  
Attorney/Advisor Signature (Optional)

\_\_\_\_\_  
Date