



## Bequest Notification Form

### Donor

Title \_\_\_\_\_ Name \_\_\_\_\_

Address \_\_\_\_\_

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

Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_ Phone \_\_\_\_\_

Email Address \_\_\_\_\_

Please notify us of any changes in your address so we can stay in touch with you.

### Executor

Title \_\_\_\_\_ Name \_\_\_\_\_

Address \_\_\_\_\_

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

Email \_\_\_\_\_ Phone \_\_\_\_\_

### Type of Bequest

I/We have included Jesuit Academy in my/our estate planning to support the mission of preparing the hearts, minds and bodies of students to thrive through a Catholic/Jesuit education as follows:

- A stated gift in the amount of \$ \_\_\_\_\_.
- I/We have included Jesuit Academy as a beneficiary of the asset(s) indicated below:
  - Retirement plan(s): \_\_\_\_\_
  - Financial or invest account(s): \_\_\_\_\_
  - Life insurance policy(s): \_\_\_\_\_
  - Other assets: \_\_\_\_\_
- A percentage of my/our entire estate, for a percentage of \_\_\_\_\_%.  
Currently, this could result in a gift in the amount of \$ \_\_\_\_\_.
- A percentage of my/our residual estate, for a percentage of \_\_\_\_\_%.  
Currently, this could result in a gift in the amount of \$ \_\_\_\_\_.
- I/We have left my/our entire estate for the benefit of Jesuit Academy.  
Currently, this could result in a gift in the amount of \$ \_\_\_\_\_.

I/We request the funds be used (please check all that apply):

Where it is most needed by Jesuit Academy.

For the programmatic work of Jesuit Academy.

To be placed in the endowment fund of Jesuit Academy.

Parent Engagement: We know that the more engaged a parent or guardian is the more successful the student is. The school continues to work on this area and find innovative ways to engage and connect with our families.

Training for Staff: The school continually offers training opportunities to staff.

Field Trips: The school strives to expose students to various schools, businesses and corporations to gain an understanding of options for their future.

School Expansion: Adhering to the needs of the community, school growth will help provide more students (men and women) with a faith-based education, while also granting a space for continued engagement post-graduation.

Technology: As the school grows and we are serving more students as well as adding more staff, so does our need to improve and replace technology.

Recruitment: Both student and teacher recruitment are vital to the expansion and sustainment of the school. Our Advancement and Admissions teams utilize many channels to recruit prospects.

Education Club: The school expects families to contribute \$500/year to their son's education. To help alleviate additional financial stress, tuition is covered by generous sponsors (\$10,000/year).

Graduate Support: Upon graduation, alumni are never alone in their future endeavors. Our dedicated staff walk alongside them through high school, college and/or a career.

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

This form is non-binding and does not constitute a legal promise of any future donation to Jesuit Academy. We understand that bequests are revocable and that your estate plans can change.

Please return this form to:

Jesuit Academy  
2311 N. 22<sup>nd</sup> Street  
Omaha, NE 68110  
Phone: (402) 346-4464, Fax: (402) 341-1817  
Email: [rpickett@jesuitacademy.org](mailto:rpickett@jesuitacademy.org)  
[www.jesuitacademy.org](http://www.jesuitacademy.org)