

Clairvaux Society of St. Bernard

St. Bernard Abbey and Preparatory School, 1600 St. Bernard Drive, S.E. Cullman, AL 35055
Fr. Paschal Pautler, Director of Development | (256) 734-8291 | frpaschal@stbernardabbey.com

How to Become a Member of the Clairvaux Society

An Invitation. The Clairvaux Society recognizes those who have made a special gift to the Clairvaux Society Foundation for the long-term benefit of St. Bernard Abbey and Preparatory School. We are especially grateful for those who name us in their Will or estate plans. You help ensure—for both monks and the faithful—the Abbey’s continued spiritual presence and corporal works of mercy.

To become a Member, Simply Notify Us. If you have named us in your estate plan, or are making provision to do so, we ask that you please notify us, using the form on the reverse side.

- *We respect your privacy.*

In the case of bequests, beneficiary designations, life insurance, and many other gift types, you may or may not choose to share specifics with St. Bernard regarding amount or percentage. The level of detail is up to you. Why, then, do we invite notification of future gifts?

- *We respect your wishes.*

Notifying the Development Office of your intentions helps us plan for our long-term future. It also ensures we understand your heart. There is a gap of many years between the creation of a Will and its execution. When the gift eventually comes to the Foundation, we have a record of your original intentions so that your gift is used as intended — for the long-term benefit of the Abbey and Prep School for general purposes.

Who do I name in a Bequest?

“The Clairvaux Society Foundation, for the benefit of St. Bernard Abbey and Preparatory School, 1600 St. Bernard Drive, Cullman, AL 35055, an Alabama Nonprofit organization (Tax ID Number 47-2976916), for its general use and purposes without restriction.”

Notification is Easy. Choose the method most convenient.

- Fill out and submit the confidential “My Gift Intentions” form on the reverse side, or...
- Express your intentions with a call or email to:
 - Fr. Paschal Pautler, Director of Development
 - frpaschal@stbernardabbey.com
 - Cell (256) 727-2284



Donors to the Clairvaux Society Foundation are recognized as an example of generosity. However, if desired, you may remain anonymous. St. Bernard Abbey does not provide legal or tax advice. Please consult your professional advisor prior to entering into any planned gift or estate arrangements.



The Clairvaux Society

My Gift Intentions

I am *considering* membership in the Clairvaux Society

I am considering:

- ☐ Leaving the Clairvaux Society Foundation a bequest in my Will or estate plan.
- ☐ Naming the Clairvaux Society Foundation as a beneficiary of (check those that apply):
 - ☐ A life insurance policy
 - ☐ Bank account
 - ☐ Investment account
 - ☐ A retirement plan
 - ☐ Commercial annuity contract
- ☐ I plan to make a gift/pledge of \$5,000 or more to the Clairvaux Society Foundation.

< OR >

Please *enroll me* In the Clairvaux Society

I have made provision for St. Bernard Abbey and Prep School in the following way(s).

- ☐ I have named the Clairvaux Society Foundation as a beneficiary in my Will or estate plan.
- ☐ I have named the Clairvaux Society Foundation as a beneficiary of (check those that apply):
 - ☐ A life insurance policy
 - ☐ Bank account
 - ☐ Investment account
 - ☐ A retirement plan
 - ☐ Commercial annuity contract
- ☐ I have included the Clairvaux Society Foundation as a beneficiary of a Charitable Remainder Trust.

- ☐ In making this gift intention, I prefer to remain anonymous.

Signature(s)

Today's Date

Print Name Clearly

Date of Birth

Address

Preferred Email and Phone

Return to:

Fr. Paschal Pautler, Director of Development | St. Bernard Abbey, Cullman AL 35055
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