

SAMPLE GIFT LANGUAGE FOR YOUR WILL OR TRUST

Gifts to the **Catholic Diocese of Arlington:**

I give, devise and bequeath to Most Reverend Michael F. Burbidge, Bishop of the Diocese of Arlington, and his Successors in Office (Tax ID# 54-0967542), 200 N. Glebe Road, Suite 811, Arlington, Virginia 22203 the amount of *(insert specific amount, residual, asset or percentage of estate)*. These funds are to be used at the sole discretion of the Bishop.

Gifts to a **Parish or Parochial School:**

I give, devise and bequeath to *(insert parish name)* *(insert Tax ID #)*, *(insert parish address)* the amount of *(insert specific amount, residual, asset or percentage of estate)* to benefit *(insert parish or school name)*. These funds are to be used at the sole discretion of the pastor.

Gifts to a **Catholic High School or Regional School:**

I give, devise and bequeath to Most Reverend Michael F. Burbidge, Bishop of the Diocese of Arlington, and his Successors in Office (Tax ID# 54-0967542), 200 N. Glebe Road, Suite 811, Arlington, Virginia 22203 the amount of *(insert specific amount, residual, asset or percentage of estate)* to benefit _____ **Catholic High School**. These funds are to be used at the sole discretion of the Bishop for the benefit of _____ **Catholic High School**.

GIVING THROUGH A BENEFICIARY DESIGNATION

Name the Diocese of Arlington or a parish or school as the sole or partial beneficiary of any of the following:

- Life Insurance Policies
- Certificates of Deposit
- Retirement Assets
- Checking and Savings Accounts
- Credit Union Accounts
- Brokerage Account

1. Call or go online to your Plan Administrator or Bank to request a “Change of Beneficiary” form.
2. Provide the name of your chosen beneficiary along with the beneficiary’s address and tax ID number.

Sample Beneficiaries:

- a. Most Reverend Michael F. Burbidge, Bishop of the Diocese of Arlington, and his Successors in Office
Tax ID# 54-0967542
200 N. Glebe Road, Suite 811, Arlington, Virginia 22203
- b. Parish or School (i.e., St. Ann Catholic Church, Inc. or St. Ann Catholic Church Inc., for the benefit of St. Ann Catholic School)
Parish Tax ID # (Contact Development Office at the Diocese of Arlington)
Parish Address
- c. Catholic Charities of the Diocese of Arlington, Inc.
Tax ID# 54-0515706
200 N. Glebe Road, Suite 811, Arlington, Virginia 22203
- d. The Scholarship Foundation at the Diocese of Arlington, Inc.
Tax ID# 46-1449555
200 N. Glebe Road Suite 811, Arlington, Virginia 22203
- e. The Foundation for the Catholic Diocese of Arlington, Inc.
Tax ID # 45-3581965
200 N. Glebe Road, Suite 811, Arlington, Virginia 22203

This information is for general informational purposes only and does not constitute legal or tax advice. We recommend consulting with an attorney or tax advisor.