St. Gregory Legacy Society

Define your legacy

Membership in the St. Gregory Legacy Society

Donors of planned gifts to Mount St. Mary's Seminary & School of Theology (MTSM) are eligible for membership in the St. Gregory Legacy Society (SGLS).

SGLS Membership is one way the Seminary is able to thank you during your lifetime for your planned gift. SGLS Members receive:

- Invitations to enjoyable and informative events such as:
  - The SGLS Luncheon, on or close to the Feast of St. Gregory the Great (September 3) honoring new members to the Society
  - Select Presidential Events
  - MTSM Lectures and Music & Liturgy Events
- Regular exclusive communications from the MTSM President & Rector
- Listing on the athenaeum.edu website
- A certificate of membership

Leave your mark

Including Mount St. Mary's Seminary & School of Theology in your Estate Plan

Bequests and other testamentary gifts by generous alumni and friends have been a significant source of financial support for the Seminary for nearly 200 years. These remembrances contribute to MTSM's future financial strength and continued excellence.

A gift to the Seminary through your estate plan qualifies you as a member of the St. Gregory Legacy Society, created to recognize and thank donors whose foresight is to build the future of MTSM.

You can make a specific gift to MTSM of cash, securities, real estate or other property through your will, codicil or trust instrument. You also can designate MTSM as the beneficiary of all or part of the remainder of your estate or trust. Another way to include the Seminary in your estate plan is to name MTSM as a beneficiary of your retirement plan or life insurance policy.

A bequest or trust provision for the benefit of MTSM may qualify your estate for an estate tax charitable deduction.

For More Information

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Vice President, Development & Relations
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MOUNT ST. MARY'S SEMINARY & SCHOOL OF THEOLOGY
CINCINNATI ✝ OHIO

Sample Testamentary Language

"I give $ _____ or (a specific asset, such as securities, real estate or other property) or (all) or (_____%
of the rest, residual and remainder of my estate) to MTSM in Cincinnati, Ohio (for general purposes) or (for the
following purpose: _____)."

While unrestricted gifts allow the Seminary to allocate funds to areas of greatest need, you may designate your bequest
for a particular purpose, program or activity at MTSM. In order to ensure that the evolving needs of future generations
of seminarians, permanent deacons and lay ministers are met, it is advisable to include the following language with
restricted gifts:

"In the event that at some future time due to changed circumstances, in the judgment of the MTSM Board of Trustees,
it becomes impractical to apply my bequest to the designated purpose(s), the MTSM Board of Trustees shall make such
modifications as will appropriately recognize my interest in coordination with Seminary priorities."

If you wish to document your bequest intention at this time, please complete the form below.

Documenting Your Intention

In order to support the mission of MTSM, I have included a non-contingent bequest to the Seminary as part of my
estate plan. A copy of the relevant provision of my will or trust is attached. If I make any change to this provision, I will
notify MTSM of such change.

Name: _____

Address: _____ City: _____ State: _____ Zip:_____

Home Telephone: _____ Mobile Telephone: _____

Email address: _____

Current Value of Bequest: _____ Date of Birth: _____

Signature: _____ Date: _____

St. Gregory Legacy Society Membership

I (we) understand that my (our) estate is not legally bound by this statement and may choose to add, subtract or revoke
this bequest at any time at my (our) sole discretion.

It is my (our) desire that this gift be used to benefit the following initiative, purpose, or wherever the need is greatest:

_____

In publications and donor listings, I wish my name to read as follows:

_____

Signature(s): _____ Date: _____

_____ Date: _____