

DIOCESE OF ROCKFORD
STATEMENT OR WAIVER OF CONDITIONS PLACED ON PROPOSED CHARITABLE GIFT

This Statement of Conditions is made this _____ day of _____, 20____.

1. Name and address of individual/entity proposing to make the charitable gift:

2. Name and address of entity to which the gift is proposed to be made:

3. The gift is described as follows:

4. The Donor places the following conditions on the proposed gift OR states that no conditions exist on the proposed gift (check one):

the following conditions apply:

Donor states that no conditions are attached to the proposed gift, and Donor waives any conditions.

5. In the event the conditions of the gift become incapable of fulfillment, unnecessary, or impractical, may the Diocese/Parish/School/Other entity release the conditions as necessary to otherwise utilize the gift as closely as reasonably possible to carry out the Donor's original charitable endeavor?

yes

No

DONOR:

Print Name

By: _____

Its: _____

DONOR:

Print Name

By: _____

Its: _____

DONOR:

Print Name

By: _____

Its: _____

The above described gift is accepted by _____.

The above described gift is declined by _____ because the conditions placed on the gift cannot be fulfilled, and Donor has not consented to the Diocese choosing another appropriate use for or beneficiary of the proposed gift.

The above described gift is declined by _____ for the following reasons:

DONEE:

Print Name

By: _____

Its: _____



Diocese of Rockford

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(815) 399-4300
Fax (815) 399-5266

November 17, 2009

Dear Monsignor/Father:

Please find enclosed an original form which is to be used by you when accepting any gift or bequest in the amount of \$25,000.00 or more. Please feel free to make copies of this original for your current and future use.

By way of explanation, the Diocesan Finance Council has been discussing such a form for the last year of its meetings and has studied and redacted several drafts. It is an effort to minimize any possible confusion on the part of a prospective donor and the Church as to the exact intent of a gift and the Church's ability to accept the gift.

As you know, Canon Law emphasizes the will of the donor of a gift as the governing principle. That is to say, if a gift is accepted in the name of the Church, the Church is morally and canonically obliged to fulfill the donor's will. If any condition is placed on a gift by a donor and the Church cannot fulfill the condition, either the gift cannot be accepted or an effort can be made to change or drop the condition.

This form is our effort to assist you whenever such an eventuality occurs. Please begin using this form immediately and should you have any questions please contact me at the Chancery. You are reminded that a gift of this amount or a larger gift is to be reported to the Chancery (Fourth Synod of the Diocese of Rockford, Statute 268).

With thanks for your cooperation and with every personal good wish for you, I remain

Sincerely yours in Christ,

Reverend Monsignor David D. Kagan, J.C.L.
Vicar General/Moderator of the Curia