

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

When the Diocese or a Parish/School/Other diocesan entity ("Recipient") is going to receive a gift whose value is \$25,000 or more, this form must be completed prior to acceptance of the gift or bequest. The Recipient sends this form to the individual or entity proposing to make the gift or bequest ("Donor"), for completion and return to the Recipient. **The Recipient is to submit the completed form to the Diocese's Finance Department along with a copy of the bequest or will.**

1. Name and address of individual/entity proposing to make the charitable gift (examples: John Smith, Estate of John Smith, the John Smith Trust, Smith Company):

2. Name and address of entity to which the gift is proposed to be made (examples: St. Patrick Church of Rockford, St. Rita School of Aurora, Bishop Lane Retreat Center):

3. The gift is described as follows (examples: \$25,000.00 cash; proceeds of a Certificate of Deposit held at First Bank of Rockford; real estate located at 123 Main Street, Rockford with property ID number 12345; 10% of the Estate of John Smith):

4. Is the proposed gift restricted in any way? (Check one)
_____ Yes, the Donor places the following restrictions on the proposed gift (examples: the cash gift is to be used only for tuition assistance for families attending the parish's school; the real estate is to be used only for the purpose of building a rectory):

_____ No, the Donor states that no restrictions are attached to the proposed gift, and the Donor waives any restrictions.

5. In the event the restrictions 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 intent?

_____ Yes
_____ No

_____ Date: _____
Signature of Donor or Donor's representative

Printed name of Donor or Donor's Representative

_____ Date: _____
Signature of Parish/School/Other Diocesan entity Administrator

FOR DIOCESE USE:

_____ The above described gift is accepted.
_____ The above described gift is declined because the restrictions placed on the gift cannot be fulfilled, and Donor has not consented to an alternative appropriate use for or beneficiary of the proposed gift.
_____ The above described gift is declined for the following reasons: _____