

Remembering the work of the Priests of the Sacred Heart in your estate plans



If you wish to remember the work of the Priests of the Sacred Heart in your estate plans, you will find below the specific language for a variety of bequests.

1. **Bequest of Specific Property** This specifies a *specific* bequest of property, i.e. house, art, jewelry, etc. Example, "I give, devise and bequest property bequeathed) in my estate to the Priests of the Sacred Heart at Sacred Heart Monastery, P.O. Box 900, Hales Corners, Wisconsin 53130.

2. **Bequest of Specific Percentage** This specifies a bequest of a certain percentage of your estate. "I give, devise and bequeath to the Priests of the Sacred Heart at Sacred Heart Monastery, P.O. Box 900, Hales Corners, Wisconsin 53130 ____% of my estate."

3. **Bequest of Specific Amount** This is simply a gift of a specific amount and is usually written "I give, devise and bequeath to the Priests of the Sacred Heart at Sacred Heart Monastery, P.O. Box 900, Hales Corners, Wisconsin 53130, the sum of \$_____."



4. **Residual Beneficiary** This means that after all your expenses are paid (medical, funeral, taxes, etc.) and after any specific bequests are paid, the remainder (residue) is distributed to the residual beneficiary or beneficiaries. Example, "I give, devise and bequest the remainder of my estate to the Priests of the Sacred Heart at Sacred Heart Monastery, P.O. Box 900, Hales Corners, Wisconsin 53130.

When remembering the Priests of the Sacred Heart in your estate plan, it is important to include our legal name and address:

**Priests of the Sacred Heart, a Wisconsin Corporation
Sacred Heart Monastery
P.O. Box 900
Hales Corners, Wisconsin 53130**

If you wish, your bequest may be designated to be used for one of our specific ministries (e.g. missions, [seminary education](#), care of retired priests, [Masses](#) etc.). While we will always follow your wishes, our preference is to have unrestricted bequests so we can direct the funds to the ministry where they are most needed.

You may also be interested in knowing that friends who do remember our work in their estate plans are eligible to become members of the Good Steward Society ([click here to learn more](#)).



You might find it helpful to select the "print" button on the top of your screen and print this page. You may feel free to give this page to your attorney. If he or she has any questions, please have them contact Pam Milczarski, Carrie Beuning or Magdalena Arteaga at phone number 414-425-3383 or 800-448-7674 or e-mail us at plannedgiving@poshusa.org.

When deciding on how to have your estate distributed, be certain to consider the needs of family members or loved ones who may need your support. While we hope you will provide assistance for our work, we do not wish your bequest to leave dependents in a state of need.

As with any investment, we suggest you contact your attorney, accountant or financial planner for advice specific to your situation