

# Walla Walla Catholic Schools Heritage Society

## CONFIDENTIAL SURVEY

☐ I/We have already included WWCS  
in our estate planning as follows:

☐ I/We are considering how to include WWCS  
in our estate planning as follows:

<input checked="" type="checkbox"/>	Type of Estate Gift	Further description of the gift and/or value of the gift you would be willing to share with us
<input type="checkbox"/>	Provision for WWCS/Endowment in will or trust	
<input type="checkbox"/>	Retirement plan beneficiary designation	
<input type="checkbox"/>	Life insurance policy beneficiary designation	
<input type="checkbox"/>	Charitable gift annuity	
<input type="checkbox"/>	Charitable remainder trust	
<input type="checkbox"/>	Charitable lead trust	
<input type="checkbox"/>	Gift of personal property	
<input type="checkbox"/>	Gift of real estate	
<input type="checkbox"/>	Other	

☐ I/We have considered this type of support for WWCS, but have decided it does not fit my/our  
situation at the current time. However, please contact me/us again in:

six months \_\_\_\_\_ one year \_\_\_\_\_ other \_\_\_\_\_

☐ I/We would like assistance on including WWCS in our estate planning.

☐ I/We would appreciate more information about: \_\_\_\_\_  
\_\_\_\_\_

Names(s) \_\_\_\_\_

Preferred Mailing Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_ Email \_\_\_\_\_

Hm Phone \_\_\_\_\_ Bus Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

**Please try to return this confidential survey in the enclosed envelope  
within 14 days to our Director of Advancement, Jamie Van Wormer**

Thank you in advance for taking the time to respond.  
(Optional information on reverse side.)

## WWCS Heritage Society (cont.)

If you have a few more minutes to spare, we would appreciate it  
if you would share with us some information about **YOU!**

Has Walla Walla Catholic Schools been a tradition in your family?  
Have other members of your family attended WWCS? Who? Class of?

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What are some of the highlights of your life and/or career? (Please include your volunteer work, community service work, service to others, etc.)

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More about me/us/family:

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Would you be interested in seminars or more information about estate planning?  
If so, in what areas are you particularly interested?

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***Again, thank you!***