DEGREE of HONOR
A division of Catholic Financial Life

P.O. Box 3211
Milwaukee WI 53201-3211

414-273-6266 Telephone
414-278-6535 Fax
800-927-2547 Toll-Free
degreeofhonor.com

For overnight delivery use 1100 West Wells Street, Milwaukee, WI 53233-2332

Application for Estate Planning Benefit

Applicant must be a financial member of Degree of Honor, which means he/she is the primary insured on a life insurance certificate or on a spousal rider, or an annuitant. Members are eligible for a one-time reimbursement of up to $50 for the preparation of or updating of estate planning documents. The document can be a will, a health care power of attorney, a trust, or other estate-planning documents. Husband and wife members are each eligible to receive $50 for legal services pertaining to estate planning. **Application must be submitted within 90 days after the date on which services, for which the member is applying, were rendered.**

**Completing this application does not guarantee receipt of the benefit.*

Member name _____ **Policy number**_____

Member name _____ **Policy number**_____

Address_____ **Lodge/Service Club**_____

City _____ **State** _____ **Zip** _____ **Phone number**_____

E-mail address_____

This is to certify that the above member(s) of Degree of Honor have had the legal services pertaining to Estate Planning.

Legal Counsel Firm Name

_____

Completed this _____ **day of** _____, _____
date month year

Attorney Name _____
please print

Attorney Signature

_____

If it is not possible to have this form signed by the attorney who prepared the documents, a photocopy of the invoice verifying that estate planning services were performed for the above members is sufficient.

I hereby apply for the Degree of Honor Estate Planning Benefit and acknowledge that I meet the eligibility requirements as stated above. I further attest that all of the information above is true and complete to the best of my knowledge.

Signature of member _____ Date _____

Please mail completed application and any necessary supporting documentation to:
Member Engagement Department, Degree of Honor, 1100 W. Wells Street, Milwaukee, WI 53233-2332.
If you have any questions, please contact the Member Engagement Department at **800-927-2547 or 414-273-6266**