

LETTER OF INTENT FOR A FUTURE GIFT

As evidence of my desire to provide a legacy of support to White Bear Unitarian Universalist Church, I hereby inform White Bear Unitarian Universalist Church that I have made a provision for a gift to the church in my estate plan. I understand that this commitment is revocable and can be modified by me at any time.

Name: _____

Name: _____

Address: _____
Street City State Zip

Phone: _____ Email: _____@_____

Phone: _____ Email: _____@_____

It is my intent to leave a gift to White Bear Unitarian Universalist Church Endowment through my:

- | | | |
|----------------------------------------------|-----------------------------------------------------|--------------------------------------------------|
| <input type="checkbox"/> Will | <input type="checkbox"/> Retirement Plan Assets | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Living Trust | <input type="checkbox"/> Charitable Remainder Trust | <input type="checkbox"/> Charitable Gift Annuity |
| <input type="checkbox"/> Gift of Real Estate | <input type="checkbox"/> Charitable Lead Trust | <input type="checkbox"/> Other _____ |

If possible, please share with us the approximate value of your gift.

As of this date, the value of my gift is: _____

I am attaching the relevant pages of my will or a copy of my beneficiary designation form: Yes No

It is my desire that my gift be used as a contribution to the White Bear Unitarian Universalist Endowment Fund to assure the long-term viability and vibrancy of our Church and to guarantee a lasting presence in the community.

Publish my name as a member of the Legacy Circle in any church publications (e.g. Newsletter or Planned Giving Brochure).

My name should be listed as: _____

I would like this to be an anonymous gift. Please do not publish my name.

Donor Signature: _____ Date: _____

Donor Signature: _____ Date: _____

As you inform us of your intention, please consider the following information

1. It is helpful for us to have on file any supporting documentation that you may be able to share with us. Such documentation might include a copy of the relevant pages of your will or a copy of your beneficiary designation form. ***Please attach one or the other if possible, and indicate so on your form***
2. **Please notify us any time you make changes or adjustments to your gift**
3. The Legacy Circle recognizes individuals who have included White Bear Unitarian Universalist Church in their estate plans. We are grateful to have you join the Legacy Circle! So **please let us know how we may recognize you as a member of the Legacy Circle.** (We recognize Legacy Circle members by name only. We do not disclose the amount or nature of your gift.) You can do this by completing the appropriate locations in the Letter of intent, by either selecting to be recognized as a member of our Legacy Circle, or to remain anonymous.

Thank you for your generous gift

The White Bear Unitarian Universalist Church Endowment Committee