



## Sample Bequest Language

A gift to UCC church in your will or revocable trust proclaims your confidence that we will continue to serve our mission and make a difference in the lives of future generations. A bequest:

- is easy to arrange,
- will not alter your current lifestyle in any way, and
- can be easily modified to address your changing needs.

### Residual Bequest Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:

*I give and devise to UCC church (Tax ID # ), located in , , all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).*

### Specific Bequest Language

Naming UCC church as a beneficiary of a specific amount from your estate is easy:

*I give and devise to UCC church (Tax ID # ), located in , , the sum of \$\_\_\_\_\_ (or asset) to be used for its general support (or for the support of a specific fund or program).*

### Contingent Bequest Language

UCC church can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled.

*If (insert name) is not living at the time of my demise, I give and devise to UCC church (Tax ID # ), located in , , the sum of \$\_\_\_\_\_ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).*

The information presented in this literature is not intended as legal or tax advice.



## Record of Planned Gift Intention

Thank you for completing this confidential Record of Gift Intention.

If you have any questions, please contact the Senior Pastor, Rev. Dr. Peter Luckey at 888-888-8800.

Full Name: \_\_\_\_\_

Birth Date: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

### Planned Gift (Bequest) Information

UCC church is named as a beneficiary of my will or trust:

☐ For a specified amount of \_\_\_\_\_.

☐ \_\_\_\_\_ percentage.

UCC church is named as a beneficiary of the following:

☐ Retirement plan

☐ Life insurance

☐ Bank, investment or other account

☐ Real property

☐ Life-income plan (Trustee's name: \_\_\_\_\_)

My gift is (circle one) RESTRICTED/UNRESTRICTED

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Please return this form to:

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