First Universalist Church of Minneapolis

LETTER OF INTENT FOR A FUTURE GIFT

As evidence of my desire to provide a legacy of support to First Universalist Church, I hereby inform First 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 First Universalist Church through my:

☐ Will ☐ Retirement Plan Assets ☐ Life Insurance Policy

☐ Living Trust ☐ Charitable Remainder Trust ☐ Charitable Gift Annuity

☐ Gift of Real Estate ☐ Charitable Lead Trust ☐ Other _____

***If possible, please share with us the approximate value of your gift*.**
It is helpful information for our long range planning efforts.

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

It is also 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 if possible.***

***Please notify us any time you make changes or adjustments to your gift*.**

3400 Dupont Ave. S
Minneapolis, MN 55408
www.firstuniv.org
firstuniversalist@firstuniv.org
612.825.1701
fax: 612.825.8879

First Universalist Church of Minneapolis

It is my desire that my gift be used in the following manner:

☐ As a contribution to the Legacy Fund

☐ Where the need is the greatest

☐ To benefit the following program: _____

The First Universalist Legacy Fund is intended to be maintained as an endowment fund subject to the terms of its Investment and Spending Policy. This policy may, under certain circumstances, allow access to principal. Gifts not designated for the Legacy Fund may be used for operating or designated purposes at the time of the gift or over time.

The Heritage Circle recognizes individuals who have included First Universalist in their estate plans. We are grateful to have you join the Heritage Circle!

Please let us know how we may recognize you as a member of the Heritage Circle.
(We recognize Heritage Circle members by name only. We do not disclose the amount or nature of your gift.)

☐ Publish my name as a member of the Heritage Circle in any church publications (e.g. The Liberal, the First Universalist website, Planned Giving brochure).

☐ List my name only internally within the church—no outside publications (e.g. Planned Giving brochure, NOT the website nor links from the website unless access by the general public is restricted).

For either of the above options, 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: _____

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