



First Universalist Church of Minneapolis

LETTER OF INTENT FOR A FUTURE GIFT

As evidence of my/our desire to provide a legacy of support to First Universalist Church, I/we hereby inform First Universalist Church that I/we have made a provision for a gift to the church in my/our estate plan. I/we understand that this commitment is revocable and can be modified at any time. *Please notify the church office any time you make changes or adjustments to your gift.*

Name(s): _____

Address: _____
Street City State Zip

Phone: _____ Email: _____

Phone: _____ Email: _____

It is my/our intent to leave a gift to First Universalist Church through my/our:

- | | | |
|--|---|--|
| <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: _____ |

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

It is helpful for us to have on file any supporting documentation that you can share. 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.***

Continued on reverse side

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

- 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.

The Heritage Circle recognizes individuals who have included First Universalist in their estate plans.

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

- Publish my/our name(s) as Heritage Circle member(s).
 - List my/our name(s) only internally within the private church records
 - Please do not publish my/our name(s). I/we wish to remain anonymous.
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Donor Signature: _____

Date: _____

Donor Signature: _____

Date: _____