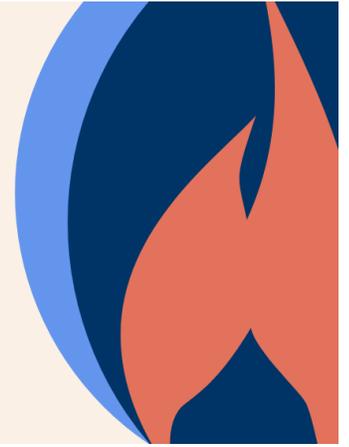


Letter of Intent for a Future Gift



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

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 at any time. If you share a household, each individual should fill out and sign a Letter of Intent and return both copies to First U.

Name: _____

Street / Mailing Address: _____

City, State, Zip Code: _____

Phone: _____ E-mail: _____

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 helpful for us to have supporting documentation on file, such as 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.

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
- Capital Reserve Fund
- To benefit the following program: _____

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.)

- Publish my name as a member of the Legacy Circle.
- List my name only internally within private church records.

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: _____

Completed forms can be submitted as a hard copy to:

First Universalist Church of Minneapolis
3400 Dupont Ave. S
Minneapolis, MN 55408
ATTN: Finance

Or, scan form and email to Finance Manager Brad Schmidt: brad@firstuniv.org