



Planned Gift Form

CONFIDENTIAL

**First UU Church of San Diego
(619) 298-9978**

Thank you for helping to ensure a solid future for our church through your planned gift and legacy. This information is needed to assist the Church in making certain your intent is realized following events that cause your gift to become due. **All documentation you provide in this form will remain private and confidential.**

Specific information is available about the various types of giving so that you may consider each and select the vehicle that best fits your situation and interests. In addition, members of the Planned Giving Committee are available to help you learn about different giving options, answer questions you may have, and help you complete the form. For planning purpose, the Church and its Endowment Funds are qualified tax-exempt organizations.

I / We recognize the positive work of the First UU Church of San Diego and wish to support it in the future by making a commitment to the:

- General Endowment Fund
 Social Justice Fund
 General Operating Fund

TYPE OF LEGACY:

- Will
 Living / Revocable Trust (Please specify name and date of trust)

- Beneficiary of an IRA, 401K or other retirement / pension plan (Please specify)

- Beneficiary of a life insurance policy
 Gift through UUA Pooled Income Fund
 Gift through UUA Charitable Gift Annuity Fund
 Other planned gift (Please specify)

CHANNING SOCIETY

- The Church may use my / our names as a member of the Channing Society and enter it on the Channing Society sculpture.
 No, I / we prefer to remain anonymous.

Please Print Name(s)

Signature(s)

Date

DOCUMENTATION

Please enclose or attach a copy of your planned giving document(s) or a relevant excerpt that includes:

- ____ The specific gifting provisions concerning the Church
- ____ The first page and signature pages of the document
- ____ The name and contact information of the estate administrator
- ____ Any information that might assist the Church in following up on your planned gift

Please contact the Church if there are any changes in your gift(s), giving intent, or contact information so that we may make or note these important changes.

A member of the Planned Giving Committee may periodically contact you also to assure that the information is current.

SPECIFIC INFORMATION:

Please include your personal contact information _____

Executor's or Successor Trustee's name, address, phone, email _____

Your Attorney's name, address, phone, email _____

Approximate share of estate or dollar amount of bequest _____

Does the legacy come to the Church after your passing or after the subsequent passing of your spouse and/or other beneficiaries? _____

If life insurance policy, name, address and phone number of the company and Policy number _____

Is life insurance paid up? _____ When was policy issued / in whose name? _____

*With deep gratitude, the ministers, board of trustees, congregation and staff of First UU Church accept the intention of your planned giving gift . You have demonstrated a profound act of generosity that will assure continued movement toward nurturing this place where people can be healed and in turn work to heal the world.
Thank you so very much. - The Planned Giving Committee*