



Advisor's Guide for Giving

Gifts from Wills and Trusts:

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name UCC in your will or trust please use the following suggested language:

Residual Bequest - A residual bequest comes to us after your estate expenses and specific bequests are paid.

I give and devise to UCC church (Tax ID #99-99999999), located in Anywhere, CA, 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 - Naming UCC as a beneficiary of a specific amount from your estate is easy.

I give and devise to UCC church (Tax ID # 99-99999999), located in Anywhere, CA, the sum of \$_____ (or asset) to be used for its general support (or for the support of a specific fund or program).

Contingent Bequest - UCC 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 # 99-99999999), located in Anywhere, CA, 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).

Gifts of Appreciated Securities:

Please contact Rev. Sally Rhodes for a stock transfer form.

Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to Rev. Sally Rhodes.

Legal Name: UCC church

Tax I.D. Number: 99-99999999

Incorporated In: Anywhere, CA

Note to Attorneys, Accountants and other professional Advisors:

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please call Rev. Sally Rhodes at 800-888-8800.

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. Sally Rhodes at 800-888-8800.

Full Name: _____

Birth Date: _____

Daytime Phone: _____

Email Address: _____

Planned Gift (Bequest) Information

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

☐ For a specified amount of _____.

☐ _____ percentage.

UCC 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: 123 Church Street, Suite: 100
Anywhere, CA 90210