



## Sample Bequest Language

A gift to UCC church in your will or revocable trust proclaims your confidence that we will continue to serve our mission and make a difference in the lives of future generations. A bequest:

- is easy to arrange,
- will not alter your current lifestyle in any way, and
- can be easily modified to address your changing needs.

### Residual Bequest Language

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 Language

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 Language

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).*

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