Chamblee First United Methodist Church Legacy Gift Confirmation Form

Name of Donor(s) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Part I: CONFIRMATION** Please describe the terms of your Legacy Gift.

**A. Type of Endowment Gift:**

I/We have provided for Chamblee First United Methodist Church through my/our:

Will Trust
IRA Insurance Policy
Retirement Plan Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**B. Designation of Legacy Gift:**

**General Endowment:** Please add my/our gift to the church’s General Endowment Fund.

**Restricted**: Please add my/our gift to the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Endowment Fund. (Please see the attached list of endowed fund gift opportunities.)

**Named Endowed Fund:** Please establish an endowed fund in the following name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_,
to be used as part of the General Endowment fund or the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Fund. (I/We understand that a minimum of $20,000 is needed to endow a named Endowment Fund.)

**C. My/Our Legacy Gift is in the following form and amount:**

**Estimated Amount:** (List either fixed amount or a percent. Since estates fluctuate in value over time, designating a percentage of your estate vs. a dollar amount will maintain the proportionate value of your gift.)

Fixed Amount $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ or Percent of the Estate \_\_\_\_\_\_\_\_\_% or Percent of IRA \_\_\_\_\_\_\_\_\_%

**Cash**: Amount $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (This includes cash and other liquid assets.)

**Specific:** Property \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (A specific Legacy Gift is one in which you designate specific assets to your church, such as real estate, artwork, stocks, bonds.)

**Residuary:** Estimated Amount $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (The church is bequeathed all or part of the remainder of your estate after other legacy gifts, debts, taxes and expenses have been paid.)

**Contingent:** Please attach the terms of the contingency to this form. (A legacy gift to the church takes place only if the beneficiaries named in your will predecease you.)

**PART II ACKNOWLEDGEMENT** Please let us know if/how we may recognize your generosity.

 YES, I/We give the church permission to publish my/our name(s) in church publications and donor acknowledgements. I/We understand that this will serve as an example for other faithful members to give.

YES, please enroll me/us as a member(s) of the Chamblee First United Methodist Legacy Fellowship.

How do you wish your name(s) to be listed in any publications that acknowledge your gift intention? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I/We wish to remain anonymous.

While I/we fully intend to bless Chamblee First UMC as described above, I/we understand that I/we am/are NOT making a legal, or binding commitment by submitting this acknowledgement. Furthermore, the church should understand that the size of my/our future gift might be significantly different from the amount estimated above for the purposes of valuation.

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print Name(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone/email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone/email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please return this completed confirmation form to:

**Chamblee First United Methodist Church**

**Attn: CFUMC Permanent Endowment and Planned Giving Ministry Committee**

**4147 Chamblee Dunwoody Road**

**Chamblee, Georgia 30341**

**Current Listing of Endowed and Non-Endowed Funds and Minimum Giving Levels**

**Name of Endowed Fund Minimum Giving Level**

1. **General Endowment Fund $1**

This is the main endowment fund for Chamblee First UMC which gives the latitude to use the proceeds from this fund in a way that best fits the current needs of the church and congregation.

1. **Capital Improvements and Unbudgeted Property Maintenance $1**
2. **Missions $1**
3. **Children’s Ministries $1**
4. **Music and Arts Ministries $1**
5. **Youth Ministries $1**
6. **Worship Fund $1**
7. **Outreach Fund $1**
8. **Benevolence Fund $1**
9. **Recreation Fund $1**
10. **Named Fund (established by donor) $20,000**