

Chamblee First United Methodist Church

Legacy Gift Confirmation Form

Name of Donor(s) _____

PART I: OPTIONS

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

☐ Cash

Other _____

B. Designation of Gift:

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

This General Endowment Fund allows the use of proceeds in a way that best fits the current needs of the church and congregation. \$10,000 minimum.

☐ **Capital Endowment:** Please add my/our gift to the **Capital Endowment Fund**.

This Capital Endowment Fund allows the use of proceeds to build and maintain the campus and its structures. \$10,000 minimum.

☐ **Named Endowed Fund:** I/we would like to create an endowed fund. \$20,000 minimum.

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

☐ **Estimated Amount:** (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.)

☐ **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.)

☐ I/we would like to meet with a member of CFUMC's Endowment Committee.

PART II ACKNOWLEDGEMENT How may we recognize your generosity?

- ☐ I/We give 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.
- ☐ Please enroll me/us as a member(s) of the Chamblee First United Methodist Legacy Fellowship.
- ☐ Please print your name(s) exactly as you wish them to be listed:

- ☐ I/We wish to remain anonymous.

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

Signed: _____ Date: _____

Print Name: _____

Address: _____

Phone: _____ Email: _____

Signed: _____ Date: _____

Print Name: _____

Address: _____

Phone: _____ Email: _____

Please return this completed confirmation form to:

**Chamblee First United Methodist Church
Attn: CFUMC Endowment Committee
4147 Chamblee Dunwoody Road
Chamblee, Georgia 30341**

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

<u>Name of Endowed Fund</u>	<u>Minimum Giving Level</u>
1. General Endowment Fund	\$1
This is the main endowment fund for Chamblee First UMC which allows the use of proceeds in a way that best fits the current needs of the church and congregation.	
2. Capital Endowment Fund.	\$1
This fund allows the use of proceeds to build and maintain the campus and its structures.	
3. Named Fund (established by donor)	\$20,000