

# Unitarian Universalist Congregation of Salem Endowments Committee

## Legacy Record

*This statement is an expression of my intent to provide for the future of the Unitarian Universalist Congregation of Salem (UUCS) through a planned or estate gift, and to advise the Endowments Committee how I would like my gift used.*

*Note for couples: We are happy to list you either separately or as a couple, depending on your preference. If you would like to be recognized as a couple, please complete this form accordingly. If you are making separate planned gifts and prefer to be listed individually in all documents and/or publications, please submit separate forms, one in each name.*

### I. Personal Information

Name of Giver: \_\_\_\_\_

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

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### II. Recognition

UUCS appreciates the opportunity to acknowledge your commitment to the Fellowship by publicly recognizing your contribution. If you prefer to remain anonymous, however, we will respect your wishes.

\_\_\_ The Endowments Committee may acknowledge my legacy gift while I am living (but not the amount) publicly in UUCS publications and announcements.

\_\_\_ I wish to remain anonymous.

End-of-life gifts: After your death, your name will be recorded on the Keepers of the Flame plaque.

For recognition purposes, my name should be listed as follows:

\_\_\_\_\_

### III. Nature of Legacy Gift

My legacy gift to UUCS will come according to the terms of:

\_\_\_ An outright bequest in my will or trust upon the passing of the donor, or the passing of the donor and spouse.

\_\_\_ A life insurance policy, in which UUCS is named as beneficiary or owner and beneficiary.

\_\_\_ Retirement assets, in which UUCS is named as a beneficiary.

\_\_\_ Planned Giving instrument, such as a Charitable Gift Annuity

\_\_\_ Other, including current gifts (please specify)

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The estimated value of my gift is _____
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### IV. How I Would Like My Gift Used

It is my wish that this legacy gift should

\_\_\_ **A. Be added to the Endowment Fund.** Income from the Endowment Fund can be used for operating or special expenses of the Congregation; the principal can only be tapped in an emergency by vote of *two* Congregational meetings.

\_\_\_ **B. Be added to the \_\_\_\_\_ Fund**

\_\_\_ **C. Be added to the Congregation's Memorial Funds, to be used for**

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\_\_\_ **D. Be used where it is most needed**

\_\_\_\_\_  
*Donor's Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Spouse's Signature*

\_\_\_\_\_  
*Date*

Note: This form is for UUCS's records only. It is not legally binding. UUCS will honor the wishes as expressed herein to the extent that UUCS may reasonably do so under law and under the bylaws and policies of UUCS at the time this gift is received.