

Unitarian Universalist Fellowship of San Dieguito

THE LEGACY SOCIETY

Members Who Have Named UUFSD in Their Will, Trust, Beneficiary Designation or Other Estate Plan

Notification of Planned Gift

To the Board of Directors of the Fellowship:

I am pleased to certify that I have amended my estate plan to leave a bequest or legacy after my death to the Unitarian Universalist Fellowship of San Dieguito.

My bequest or legacy is expected to exceed \$1,000, and I have taken the following action:
(Please describe your legacy gift. For example, "Amended will to include the Fellowship" or "Changed IRA beneficiary designation to the Fellowship" or "Added bequest to the Fellowship in my living trust" or other.)

My bequest or legacy is directed as follows ("*To the Endowment Fund*" is preferred):

- To the Endowment without restriction (preferred) (for long-term support as the bylaws provide)
- No designation (will go to general operating funds or partially to Endowment, depending on size)
- To a specific committee, program, or other use (please specify):

I intend to notify the Fellowship if my legacy plans should change or become impossible. YES

I understand I will be enrolled in the Legacy Society, which exists to honor and recognize members who have chosen to bequeath a gift, and to inspire others to do the same. YES

As a Legacy Society member, I consent to have my name used for recognition and inspiring others to make similar gifts.

- YES, I DO CONSENT
- NO, I DO NOT CONSENT

There is a Legacy Society Plaque placed in a public area of the Fellowship to honor those who have remembered the Fellowship in their estate plan. (Please choose one:)

- I DO CONSENT to have my name displayed on the Plaque. My name should appear exactly as:

- I DO NOT consent to have my name displayed on the Plaque. I understand "Anonymous" will appear on the Plaque to honor my legacy gift.

My estate plan is personal and confidential. In view of that, I choose as follows:

- I DO ELECT to share the relevant portions of the actual documents under the following controlled conditions: My estate plan documents will be kept in a sealed envelope in the safe until needed and viewed only by those with a present need to see them, e.g., the Planned Giving Committee or minister upon my death. (Please supply the documents in a sealed envelope.)
- I DO NOT ELECT to share the relevant portions of the actual documents with the Fellowship. This can be worked out by my executor upon my death.

It is my pleasure to support the Fellowship's work with this planned bequest.

In fellowship,

Signature

Please Print Name

Date