

# Unitarian Universalist Fellowship of San Dieguito

## The Legacy Society

Members Who Have Made a Planned Gift or a While-Living Gift to the Endowment Fund

### Notification of Planned or While-Living 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, **or** I am making an outright gift while living, to the Unitarian Universalist Fellowship of San Dieguito Endowment Fund.

My planned gift or while-living gift to the Endowment Fund is expected to exceed \$1,000, and I have taken the following action:

Please describe **your legacy** gift: e.g., "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** indicate "A **while-living** gift of \$\_\_\_\_\_."

My legacy bequest, or while-living gift, is directed as follows (minimum \$1,000 to Endowment fund):

- To the Endowment without restriction (preferred) (for long-term support as the bylaws provide)
- To restricted Endowment sub-fund: Outreach/Service Sub-Fund (social justice, community)
- To restricted Endowment sub-fund: Buildings/Grounds Sub-Fund
- New restricted Endowment sub-fund: \_\_\_\_\_ (Board must agree)

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 designate a gift to the Endowment, 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

The Legacy Society Plaque in the Library honors those who have designated a gift to the Endowment Fund.

- I DO CONSENT to have my name(s) 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 provide copies of relevant portions of my actual documents to UUFSD 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 will be worked out by my executor upon my death.

Executor Name: \_\_\_\_\_ Email \_\_\_\_\_ Phone \_\_\_\_\_

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

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Please Print Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Please Print Name

\_\_\_\_\_  
Date