**The Community Church of Chapel Hill Unitarian Universalist**

**conFidential**  **DONOR INTENT – PLANNED GIVING**  **CONFIDENTIAL**

The Community Church is most grateful that you have included the church in your plan of giving. Our purpose in asking you to complete this form is to ensure that your wishes are respected with regard to how your gift is used by the church.

**Gift Designation**

I/We recognize the positive work of The Community Church of Chapel Hill Unitarian Universalist and wish to support it in the future by making a commitment to the following fund(s) or purposes:

Board Designated

Capital Projects

Endowment

Other – please specify Click or tap here to enter text.

If you would like your gift to be distributed to more than one fund, please specify the distribution:

Click or tap here to enter text.

**If, in the opinion of the Board of Trustees of The Community Church of Chapel Hill Unitarian Universalist, all or part of this gift cannot at some time in the future be usefully or practically applied to the above designation or if the designation cannot be achieved because of a future change in law or unforeseeable circumstances, it may be used for any related purpose which in the opinion of the Board of Trustees will most nearly accomplish the Donor’s wishes.**

**Type of Gift**

Will

Cash Donation

Living/Revocable Trust; name and date of trust Click or tap here to enter text.

Beneficiary of an IRA, 401K or other retirement/pension; specify Click or tap here to enter text.

Beneficiary of a life insurance policy; specify company hold policy Click or tap here to enter text.

Gift of real estate, securities, or other property

Donor Advised Fund; specify fund with which invested Click or tap here to enter text.)

Other Planned Gift, e.g., UUA Umbrella Giving Service, Pooled Income Funds, Charitable Gift Annuity, Charitable Remainder Trusts; please specify Click or tap here to enter text.

**Possible Restrictions on Gift** (please specify) Click or tap here to enter text.

**Acknowledgment**

Yes No May the church tell the congregation about your intent to make a gift?

Yes No May the church tell the congregation about your gift when it is received?

**Documentation**

Please enclose or attach a copy of your planned giving documents(s) or a relevant excerpt that includes:

1. The first page and signature pages.
2. Any information that might assist the church in following up on your planned gift.

Does your gift come to the church after the subsequent passing of your spouse and/or other beneficiaries? If yes, please specify:

Click or tap here to enter text.

**Please contact the Church if there are any changes in your gift(s), giving intent, or to update contact information so that we may note these important changes. This not considered a legally binding document for Donors. Be assured that if your wishes change, the Board of Trustees will act in good faith to carry out your wishes whether or not the church is notified. A member of the Stewardship Committee may periodically contact you to ensure that your information is current.**

**Specific Information Needed**

**Estate Administrator, Executor, or Successor Trustee**

Name(s): Click or tap here to enter text.

Address: Click or tap here to enter text.

Click or tap here to enter text.

Phone #s: Click or tap here to enter text. Click or tap here to enter text.

Emails: Click or tap here to enter text. Click or tap here to enter text.

**Your personal contact information:**

Name: Click or tap here to enter text.

Address: Click or tap here to enter text.

Click or tap here to enter text.

Phone #s: Click or tap here to enter text. Click or tap here to enter text.

Email: Click or tap here to enter text.

Signature:

Date: Click or tap here to enter text.

Name: Click or tap here to enter text.

Address: Click or tap here to enter text.

Click or tap here to enter text.

Phone #s: Click or tap here to enter text. Click or tap here to enter text.

Email: Click or tap here to enter text.

Signature:

Date: Click or tap here to enter text.

**Please return to:** Board of Trustees Stewardship Committee

ATTN: Congregational Administrator

The Community Church of Chapel Hill Unitarian Universalist

106 Purefoy Road, Chapel Hill, NC 27514

919/942-2050

**09 04 2020**