



# First Unitarian Church of Dallas

## Legacy Giving Declaration of Intent/Commitment

Thank you for including First Unitarian Church of Dallas in your estate plans. Please complete this form to document your deferred gift in support of the continued financial health and well-being of the congregation.

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

PHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

### Please indicate the type of planned gift:

- ◇ Testamentary Specific
- ◇ Testamentary Residual
- ◇ Testamentary Charitable Remainder Trust
- ◇ IRA
- ◇ Life Insurance
- ◇ Employer Plan (401(k), defined contribution plan, etc.) - please specify:

\_\_\_\_\_

- ◇ Other Asset (real estate, etc.) - please specify:

\_\_\_\_\_

### Please indicate the use of the planned gift:

- ◇ General
- ◇ Restricted Gift to the Endowment Memorial Gift Fund
- ◇ Restricted Gift—please specify:

\_\_\_\_\_

### Estimated Value of the Gift

\$ \_\_\_\_\_

### Your Attorney

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

PHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_



# First Unitarian Church of Dallas

## Legacy Giving Declaration of Intent/Commitment (Page 2)

### Executor of Your Will

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

PHONE: \_\_\_\_\_

### Financial Advisor (if your gift includes an IRA)

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

PHONE: \_\_\_\_\_

### Life Insurance Agent

(if your gift includes life insurance)

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

PHONE: \_\_\_\_\_

### Human Resources Contact

(if your gift includes an employer plan)

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

PHONE: \_\_\_\_\_

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I/we declare and affirm that I/we have made a specific commitment through my/our will(s), trust(s) or other legal and binding instrument(s), to the First Unitarian Church of Dallas.

Donor Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Donor Signature: \_\_\_\_\_

Date: \_\_\_\_\_

### First Unitarian's Acknowledgement:

Name (print): \_\_\_\_\_

Position: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_