

**CONFIDENTIAL**

# Now & Tomorrow

## PLANNED GIVING at First UU Church of San Diego

Planned Gift Form

First Unitarian Universalist Church of San Diego

4190 Front Street | San Diego, CA | 92103 | www.firstuusandiego.org | 619.298.9978

Thank you for helping to ensure a solid future for our church through your Planned Gift. This **private and confidential information** will assist the Church in making certain your wishes are realized. Specific information is available about the various types of giving so that you may consider each and select the vehicle that best fits your situation and interests. In addition, the Planned Giving Committee is available to help you learn about different giving options, answer questions, and help you complete this form. The Church and its Endowment Funds are qualified tax-exempt organizations.

**I / We recognize the positive work of the First UU Church of San Diego and wish to support it in the future by making a commitment to the:**

- First Church Legacy Endowment Fund       Social Justice Fund
- Other—please specify \_\_\_\_\_

### TYPE OF LEGACY GIFT:

- Will
- Cash Donation
- Living / Revocable Trust (please specify name and date of trust)
- Beneficiary of an IRA, 401K or other retirement / pension plan (please specify)
- Beneficiary of a life insurance policy
- Other Planned Gift, e.g. UUA Umbrella Giving Service, Pooled Income Funds and Charitable Remainder Trusts (please specify)

### SUSTAINERS OF THE FLAME

Sustainers of the Flame are those individuals who have made or arranged to make a contribution to First UU Church's long-term financial health. Membership is bestowed upon those arranging to support First UU Church through a Living Gift or a Planned Bequest. As a giving guideline, eligible gifts and bequests should meet or exceed \$2,500 per person. Benefits include an engraved name placed on the beautiful "Sustainers of the Flame" sculpture and invitations to a private annual reception with the lead minister.

- My/our gift will meet the guidelines for Sustainers of the Flame membership as described above.  
Yes \_\_\_\_\_ No \_\_\_\_\_
- May we use your name(s) as a member of Sustainers of the Flame, on the sculpture, and on our website?  
Yes \_\_\_\_\_ No \_\_\_\_\_
- If you are making a bequest, may the Church tell the congregation about your bequest once it is received?  
Yes \_\_\_\_\_ No \_\_\_\_\_

***Please continue and sign on the back of this form.***

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**DOCUMENTATION**

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

- The first page and signature pages.
- The name and contact information of the estate administrator.
- Any information that might assist the Church in following up on your planned gift.

**SPECIFIC INFORMATION:**

- Executor’s or Successor Trustee’s name, address, phone, email:

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- Please include your personal contact information below.

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. A member of the Planned Giving Committee may periodically contact you to assure that our information is current.

Does your gift come to the Church after *your passing*   
or after the subsequent passing of your *spouse and/or other beneficiaries* ?

**Please Print Name (s)**

**Address**

**Phone**

**Email**

**Signature (s)**

**Date**



**Please return to: Planned Giving  
Attn: Development Manager  
First UU Church of San Diego  
4190 Front Street, SD, CA, 92103-2098**