



## 3 Steps to Making a Beneficiary Gift

Did you know that the beneficiaries named on a retirement plan or life insurance policy determine who will receive these funds, even if they are designated differently in your will? Did you also know that funds remaining in your IRA may be subject to multiple taxes if left to your estate?

If you are considering including a gift for First Congregational Church in your will, we have a simple solution. Name First Congregational Church as a beneficiary or partial beneficiary of your retirement plan and leave other less-taxed assets to your family.

IT'S EASY AS 1, 2, 3!

1. Request a "change of beneficiary" form from your plan administrator.
2. List "The First Congregational United Church of Christ of Sarasota, Inc." as beneficiary at the following address:
3. Inform us of your intentions so we can thank you!

The information presented in this literature is not intended as legal or tax advice.



## Record of Planned Gift Intention

Thank you for completing this confidential Record of Gift Intention.  
If you have any questions, please contact the OFFICE ADMINISTRATOR, BOBBI MILLER at 941-953-7044.

Full Name: \_\_\_\_\_

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

Daytime Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

### Planned Gift (Bequest) Information

First Congregational Church is named as a beneficiary of my will or trust:

For a specified amount of \_\_\_\_\_.

\_\_\_\_\_ percentage.

First Congregational Church is named as a beneficiary of the following:

Retirement plan

Life insurance

Bank, investment or other account

Real property

Life-income plan (Trustee's name: \_\_\_\_\_)

My gift is (circle one) RESTRICTED/UNRESTRICTED

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

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

Please return this form to: