



## Sample Bequest Language

A gift to First Congregational United Church of Christ of Sarasota in your will or revocable trust proclaims your confidence that we will continue to serve our mission and make a difference in the lives of future generations. A bequest:

- is easy to arrange,
- will not alter your current lifestyle in any way, and
- can be easily modified to address your changing needs.

### Residual Bequest Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:  
*I give and devise to The First Congregational United Church of Christ of Sarasota, Inc. (Tax ID # 59-0896302), located in , , all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).*

### Specific Bequest Language

Naming First Congregational Church as a beneficiary of a specific amount from your estate is easy:

*I give and devise to The First Congregational United Church of Christ of Sarasota, Inc. (Tax ID # 59-0896302), located in , , the sum of \$ \_\_\_\_\_ (or asset) to be used for its general support (or for the support of a specific fund or program).*

### Contingent Bequest Language

First Congregational Church can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled.

*If (insert name) is not living at the time of my demise, I give and devise to The First Congregational United Church of Christ of Sarasota, Inc. (Tax ID # 59-0896302), located in , , the sum of \$ \_\_\_\_\_ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).*

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:

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