

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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