



## Bequest Intention for the Endowment Fund

Please use this form for any or all of the following:

- to notify the Endowment Committee of a bequest intention
- to authorize disclosure of your name(s) as a member of the Bethany United Methodist Church Legacy Society, which is comprised of those who have made a commitment to the long term support of the church, a gift that will live on beyond the lifetime of the contributors
- to provide details of any designations for your bequest intention that are not provided in other documents such as wills, trusts, insurance, 401(k), IRA, etc. beneficiary designations.

### Donor Commitment

\_\_\_\_\_ and \_\_\_\_\_ (“Donors”) have executed wills(s)\_\_, trust(s)\_\_, insurance policies\_\_, 401(k)/IRA/other\_\_ beneficiary designations dated \_\_\_\_\_ providing that at the death of the survivor of the Donors, Bethany United Methodist Church Permanent Endowment will receive a gift of \$ \_\_\_\_\_ or \_\_\_\_\_% of the residue of their estate. The gift will be in a form acceptable to the church as outlined in the Gift Acceptance Policy. A copy of the relevant pages of each of the Donors’ wills/trusts/policies/accounts is attached.

**To be used with an Estate gift:** While neither the Donor’s will nor Donors’ wills can guarantee the future value of this gift, the Donors estimate a current value of \$ \_\_\_\_\_.

**To be used for a designated gift (which requires a gift of at least \$10,000):** I/we designate our gift to be used for the following purpose(s) \_\_\_\_\_

The gift, when received will be used to benefit Bethany UMC in accordance with the guidelines set out in the Permanent Endowment Fund Charter.

### Donor relationship with Bethany UMC

Bethany United Methodist Church acknowledges that the Donors retain the right to amend their estate plan at any time. The Donors will inform the church should they make a change affecting the churches interest.

I also authorize the Endowment Committee to include my/our name(s) as a member(s) of the Legacy Society of Bethany United Methodist Church.

\_\_\_\_\_  
Donor Signature(s)

\_\_\_\_\_  
date

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On behalf of the Endowment Committee, I agree that the designation, if any, satisfies Bethany's Gift Acceptance Policy.

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*Bethany UMC Representative*

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*date*

Please send this form to the Endowment Committee at Bethany's address or email it to [endowment@bethanyum.org](mailto:endowment@bethanyum.org)

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