CONFIDENTIAL

THE COMMUNITY CHURCH OF CHAPEL HILL UNITARIAN UNIVERSALIST

DONOR INTENT FOR PLANNED GIVING

Your name or names

The Community Church is most grateful that you have included the church in your plan of giving. Our purpose in asking you to complete this form is to ensure that your wishes are respected with regard to how your gift is used by the church.

Gift Designation

I/We recognize the positive work of The Community Church of Chapel Hill Unitarian Universalist and wish to support it in the future by making a commitment to the following fund(s) or purposes:

- ☐ Board Designated
- ☐ Capital Projects
- ☐ Chalice Fund
- ☐ kast Fund
- ☐ Other – please specify _____

If you would like your gift to be distributed to more than one fund, please detail your wishes here:

Please Note: If, in the opinion of the Board of Trustees of The Community Church of Chapel Hill Unitarian Universalist, all or part of this gift cannot at some time in the future be usefully or practically applied to the above designation or if the designation cannot be achieved because of a future change in law or unforeseeable circumstances, it may be used for any related purpose which in the opinion of the Board of Trustees will most nearly accomplish the Donor's wishes.

Acknowledgement and Disclosure

May the church recognize you with others who have made a planned gift?

☐ Yes ☐ No

May the church tell the congregation about your gift when it is received?

☐ Yes ☐ No

Gift Type

- ☐ Will
- ☐ Cash Donation
- ☐ Living/Revocable Trust
- ☐ Beneficiary of an IRA, 401K or other retirement/pension
- ☐ Beneficiary of a life insurance policy
- ☐ Beneficiary of a brokerage account
- ☐ Other Planned Gift (please detail below)

For a trust, please specify the name and date of the trust, and for other accounts, life insurance policies, DAF, please specify the financial institution that holds the account or policy.

Does your gift come to the church after the subsequent passing of your spouse and/or other beneficiaries? If so, please detail below:

Your contact information	
Name or names	
Address	
Phone	
Email	
Signature	Date

Contact Information for Estate Administrator, Executor, or Successor Trustee
Name
Address
Phone
Email

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. This is not considered a legally binding document for Donors. Be assured that if your wishes change, the Board of Trustees will act in good faith to carry out your wishes whether or not the church is notified. A member of the Stewardship Committee may periodically contact you to ensure that your information is current.

Return To:

Board of Trustees Stewardship Committee
ATTN: Congregational Administrator
The Community Church of Chapel Hill Unitarian Universalist
106 Purefoy Road, Chapel Hill, NC 27514
(919) 229-9452