



LEGACY GIFT CONFIRMATION FORM

Name of Donor(s) _____

PART I: CONFIRMATION

Please describe the terms of your Legacy Gift.

A. Type of Endowment Gift:

I/We have provided for Crossroads United Methodist Church through my/our:

- | | |
|--|---|
| <input type="checkbox"/> Will | <input type="checkbox"/> Trust |
| <input type="checkbox"/> IRA | <input type="checkbox"/> Insurance Policy |
| <input type="checkbox"/> Retirement Plan | <input type="checkbox"/> Other _____ |

B. Designation of Legacy Gift:

- General Endowment:** Please add my/our gift to the church's General Endowment Fund.
- Restricted:** Please add my/our gift to the _____ Endowment Fund.
(Please see the attached list of endowed fund gift opportunities.)
- Named Endowed Fund:** Please establish an endowed fund in the following name _____,
to be used as part of the General Endowment fund or the _____ Fund.
(I understand that a minimum of \$20,000 is needed to endow a named Endowment Fund.)
- Unrestricted Gift to the Church (not an endowment gift):** Please give my/our gift to the church
to be used as decided by the Finance Committee
- Restricted Gift to the Church (not an endowment gift):** Please give my/our gift to the church to
be used for _____.

C. My/Our Legacy Gift is in the following form and amount:

- Estimated Amount:** (List either Fixed amount or a percent. Since estates fluctuate in value over time, designating a percentage of your estate vs. a dollar amount will maintain the proportionate value of your gift.) Fixed Amount \$ _____ or Percent of the Estate _____%
- Cash:** Amount \$ _____ (This includes cash and other liquid assets.)
- Specific:** Property _____ (A specific Legacy Gift is one in which you designate specific assets to your church, such as real estate, artwork, stocks, bonds.)
- Residuary:** Estimated Amount \$ _____ (The church is bequeathed all or part of the remainder of your estate after other legacy gifts, debts, taxes and expenses have been paid.)
- Contingent:** Please attach the terms of the contingency to this form. (A legacy gift to the church takes place only if the beneficiaries named in your will predecease you.)

(over)

PART II ACKNOWLEDGEMENT Please let us know if/how we may recognize your generosity.

YES, I give the church permission to publish my/our name(s) in church publications and donor acknowledgements. I understand that this will serve as an incentive for other faithful members to give.

How do you wish your name(s) to be listed in any publications that acknowledge your gift intention?

I wish my gift to remain anonymous.

I understand that I am NOT making a legal, or binding, commitment by submitting this acknowledgement. Furthermore, the church should understand that the size of my future gift might be significantly different from the amount estimated above for the purposes of valuation.

Signed: _____ Date: _____

Signed: _____ Date: _____

Print Name(s): _____

Phone: _____

Email(s): _____

Please return this completed confirmation form to:
Crossroads United Methodist Church
Attn: CUMC Legacy Ministry Committee
1600 Main Street
Perry, Georgia 31069

Current Listing of Endowed and Non-Endowed Funds and Minimum Giving Levels

<u>Name of Endowed Fund</u>	<u>Minimum Giving Level</u>
1. General Endowment Fund	\$1
This is the main endowment fund for Crossroads UMC which gives the latitude to use the proceeds from this fund in a way that best fits the current needs of the church and congregation.	
2. Capital Improvements and Unbudgeted Property Maintenance	\$1
3. Children's Ministries	\$1
4. Youth Ministries	\$1
5. Named Fund (In Memory or In Honor)	\$20,000

<u>Name of Non-Endowed Fund</u>	<u>Minimum Giving Level</u>
1. General Fund	\$1
2. Capital Improvements and Unbudgeted Property Maintenance	\$1
3. Children's Ministries	\$1
4. Youth Ministries	\$1
5. Named Fund (In Memory of In Honor)	\$20,000