

Northwest Unitarian Universalist Congregation Endowment Fund

Confidential Charitable Gift, Will, Trust or other Estate/Plans Form

If you have already remembered the Northwest Unitarian Universalist Congregation Endowment Fund (NWUUCEF) in your will, trust or other estate plans, we are most grateful. We invite you to join the Northwest Legacy Society as a Member and eventually immortalized on Northwest memorial plaque. Please complete this form as confirmation of your membership and return it to an Endowment Committee member. We realize that some of this information is sensitive, and we assure you that it will be kept in confidence.

If you want information about how to get started or about how to include NWUUCEF in your bequest or other gift, existing will, trust or other instrument and estate/plan, please complete this form and return.

___ Yes, a gift to the NWUUCEF is already in my/our estate/plan(s). Please enroll me/us as (minimum \$1,000 per person) Member(s) of the Northwest Legacy Society.

___ I/We have made my/our will(s), trust(s), or other instruments but have not yet included the NWUUCEF. I'd like information on how to make a gift through my/our existing will(s), trust(s) or other instrument(s) and estate/plan(s).

___ I/We have not yet made any provision of any sort to make a bequest or other gift to Northwest, but would like to meet with an Endowment Committee member to discuss it.

___ I/We would like to make cash or other contribution to the Legacy Society (minimum \$1,000 per person). This makes me/us eligible to be memorialized on the Northwest Memorial Plaque. Check can be made to Northwest Endowment Fund with NWLS membership in the For/Memo space.

Name _____ Birth Date _____

Name _____ Birth Date _____

Address _____

City _____ State _____ Zip _____

Tel(s). _____ Cell(s) _____

Email _____

Email _____

Purely for the Congregation's confidential records, we respectfully request (should you be so inclined) a description of your generosity in your estate or other planning., ideally either by way of quoting in a letter the relevant section(s) of the will(s), trusts(s), or other instrument(s) pertaining to NWUUCEF or by way of simply attaching a copy of those section(s). If these sections change, please let us know.

Date _____ Signature _____

Date _____ Signature _____

Thank you for support of the future of Unitarian Universalism at NWUUC.