

# Legacy Gift Notification Form

If you have made provision for [ Church Name ] in your will, trust or other estate planning arrangement, please complete this form. It may either be mailed to the address below, or e-mailed to [ name | title | contact ].

This information is not legally binding and your gift intention can be changed at any time. There is no minimum legacy gift. Any gift that you designate is meaningful to [ church name ] and to the Episcopal Diocese of San Diego.

## Personal Information

Name \_\_\_\_\_ Date of Birth (*optional*) \_\_\_\_\_

Name of Spouse / Partner (*optional*) \_\_\_\_\_

Address \_\_\_\_\_

City, State & Zip \_\_\_\_\_

Preferred Phone \_\_\_\_\_ E-Mail \_\_\_\_\_

## Type of Gift (*optional*)

I / we have included [ Church Name ] in our:

\_\_\_\_\_ Will or living trust

\_\_\_\_\_ Charitable trust or gift annuity

\_\_\_\_\_ Life insurance (*as a beneficiary*)

\_\_\_\_\_ IRA /other retirement account (*as a beneficiary*)

\_\_\_\_\_ Other (*please specify*)

\_\_\_\_\_ I/we have yet to determine the exact nature of my/our gift in our will or estate plan but intend to do so.

\_\_\_\_\_ I worked with a professional advisor to create my estate plans:

Name(s) \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

## Recognition as a member

\_\_\_\_\_ I/we realize that my/our name(s) may be listed in annual reports and other forms of communication and I/we consent to such publication. Please list my/our name(s) as follows: \_\_\_\_\_

\_\_\_\_\_ I / we wish to remain anonymous.

## Comments / Questions

Return this form to: [ name | title | contact ].