

## Confidential Statement of Bequest Intention

Thank you for choosing to make a generous gift to Myers Park Presbyterian Church through your estate plan. Such “legacy gifts” are a way we all can deepen our response to God’s grace. Any information you can share through this form provides the church a non-binding record of your bequest intentions.

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

As part of your estate plan, have you designated your gift to be used by MPPC for a specific purpose or as an unrestricted gift?

\_\_\_ **Unrestricted Bequest.** My gift is completely unrestricted and can be used for any purpose and over any time period in the discretion of the Session.

\_\_\_ **Designated Gift.** I have designated my gift to one or more of the following areas within the church’s endowment:

- \_\_\_ Unrestricted Endowment
- \_\_\_ Worship and Music Ministry
- \_\_\_ Faith Formation
- \_\_\_ Congregational Life
- \_\_\_ Outreach Ministries
- \_\_\_ Vocational and Denominational Support
- \_\_\_ Administration of Facilities

\_\_\_ Under the terms of my estate plan, if a particular ministry program is no longer continued, funds can be redirected by the Session to another ministry purpose.

My gift is either in the form of a quasi-endowment or a permanent endowment, as follows:

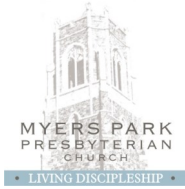
\_\_\_ **Quasi-Endowment Fund.** Distributed earnings will be applied to the designated ministry areas unless and until, in the judgment of the Session, the fund principal is best applied to the ministry areas designated.

\_\_\_ **Permanent Endowment Fund.** Distributed earnings will be applied to the designated ministry areas and principal will be preserved permanently.

### Legacy Partners

By making this gift, you become a Legacy Partner. In an effort to inspire others to be called to make similar gifts, we would like to list Legacy Partner members in MPPC publications and/or recognize you at events from time to time. Please indicate your preference:

- \_\_\_ I would like to be listed as a Legacy Partner
- \_\_\_ I wish to be an anonymous Legacy Partner



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## Optional Information:

All information in this statement of intention does not constitute a legal obligation and will not be legally binding upon you or your heirs or your estate in any way. Further, it is understood that the size of your future gift may be different from the amount or proportion of your estate estimated below. If you make any changes to your estate plans, please notify us so that we may update our records.

**Estimate and Type of Bequest.** If you are willing to disclose, please provide the information requested below. Check all the means of gifting that apply and estimate the percentage of your estate and/or the value of each gift in today's dollars.

What percent of your estate are you returning to God's work? \_\_\_\_\_

\_\_\_ Will: \_\_\_\_\_

\_\_\_ Insurance Policy: \_\_\_\_\_

\_\_\_ Revocable trust: \_\_\_\_\_

\_\_\_ Real Estate (please describe below): \_\_\_\_\_

\_\_\_ Charitable Remainder Trust: \_\_\_\_\_

\_\_\_ Retirement Plan/IRA: \_\_\_\_\_

## How did you hear about Legacy Partners?

\_\_\_ Legacy Newsletter    \_\_\_ Ambassador    \_\_\_ Church Member    \_\_\_ Other \_\_\_\_\_

## Additional Information:

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Is your bequest contingent? \_\_\_ Yes \_\_\_ No (If yes, please explain):

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Note: A contingent bequest comes to MPPC only if the other named beneficiaries do not survive you.

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

Date: \_\_\_\_\_

For more information, please contact Lauren Mulcahy at [lmulcahy@myersparkpres.org](mailto:lmulcahy@myersparkpres.org) or 704-927-1259.