

Unitarian Church of Montpelier – Planned Giving Gift Form

UCM's Planned Giving Program fosters generosity among members and friends, to the end that they may include UCM in their estate plans and other financial documents designed to take effect upon their deaths. Planned gifts are legally binding, if still in effect, only at the death of the donor.

A. *I/we have arranged the following type of gift to the Unitarian Church of Montpelier.*

- Will
- Living/Revocable Trust
- IRA Beneficiary, 401(k) or other retirement/pension plan
- Life Insurance Policy, Real Estate, or Investment Account Beneficiary
- Other Planned Gift; for example, UUA Pooled Income Fund, Umbrella Giving, or Charitable Remainder Trust

Please attach a copy of your planned giving document(s) or relevant excerpt, to include:

- First page, page describing planned gift (w/specific dollar amounts or percentages), and signature page
 - Name and contact information of estate administrator, if applicable
 - Any other information here, that will assist the church in processing your planned gift
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B. *Although I/we have not yet arranged a planned gift, it is my/our intention to do so.*

*I/we anticipate that arrangements will be made by _____ (estimated month and year).
Please state if known: we intend to make the following planned gift (type of gift and projected amount or percentage): _____.*

Confidentiality The contents of this document are confidential. The Planned Giving Committee will annually report planned giving information to the congregation only in summary, anonymous form; that is, by number, types and amounts if known. The Committee, with donors' consent only, will reveal their identity and other information (such as type of gift and/or the amount) for purposes of publicizing the Planned Giving Program, to the end that others will be encouraged to make similar gifts.

I/we consent to the release of the following information to the UCM community concerning our planned gift: Type of planned gift Amount of planned gift Applicable percentage

I/we do not consent to the release of any information about our planned gift.

Please print name(s) _____ Age(s) _____

Address _____

Phone _____ Email _____

Signature(s) _____ Date _____

We welcome your questions, comments, and suggestions. Thank you for making or considering a planned gift to UCM. Please return this form to Peter Thoms; 16 Fuller Street, Montpelier, Vermont 05602; peter.thoms1@gmail.com; (802) 223-2648; Other Committee members: Brenda Bean, Paul Ohlson

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