

## Bequest Confirmation Form

We are most grateful for your commitment to Plymouth Congregational Church and for your intention to leave a legacy gift to the Church. We encourage you to complete this confidential form and return it to the Church in the enclosed envelope.

This form is not a legally binding document. It simply serves as a way for us to say thank you and to have accurate information as to your intentions and wishes.

### Personal Information

Name or Name(s) \_\_\_\_\_

Address \_\_\_\_\_

Preferred phone \_\_\_\_\_

Email Address \_\_\_\_\_

### Flame Society and Acknowledgment

Plymouth Church recognizes and celebrates those who include the church in their estate plans. These individuals become a part of the Flame Society. You may choose to remain anonymous for recognition. All members of the Flame Society are included in celebrations, such as Legacy Sunday Luncheons.

Please check one:

\_\_\_\_\_ I/We are willing to be publicly acknowledged, such as listing my/our names in a church publication, for church use only. (Financial information is never published.)

\_\_\_\_\_ I/We prefer to remain anonymous.

Signatures

Date

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*Please see other side for sample bequest language.*

*What came to us as seed may go to the next generation as blossom, and what came to us as blossom may go to them as fruit.*

- Henry Ward Beecher

## You can decide how your legacy gift is used.

There are two options:

1. A gift to Plymouth's **Legacy Fund**. This is an unrestricted fund where the principal, or original gift, **and** earnings are available to support Plymouth's future needs. Gifts to this fund offer the most flexibility to the church and are preferred.
2. A gift to Plymouth's **Endowment Fund**. This is a restricted fund where the principal, or original gift amount, is held in perpetuity with **only** the annual earnings available to support Plymouth's future needs.

Both of these funds are thoughtfully managed and any withdrawal is approved by the Board of Deacons or the congregation. It is important that you designate in your will or beneficiary form whether you want your legacy gift directed to the Endowment Fund or to the Legacy Fund. If you wish to designate your legacy gift to a specific church ministry or program, such as music, social justice or spiritual education, please contact the Acting Senior Minister Paula Northwood before finalizing your will or beneficiary.

### Sample Bequest Language

Here is an example of words may be used in your will:

I give and bequeath to Plymouth Congregational Church at 1900 Nicollet Avenue, Minneapolis, MN 55403 \_\_\_\_\_ **[amount or percent of my estate]** for Plymouth Congregational \_\_\_\_\_ **[Legacy or Endowment]** Fund. Federal Tax ID: 41-0693946.

For more information or assistance in making a legacy giving, please contact:

- Jean Kennedy 612-376-7719 [jkennedy21@comcast.net](mailto:jkennedy21@comcast.net)

OR

- Paula Northwood, Acting Senior Minister 612-977-1263 [paulan@plymouth.org](mailto:paulan@plymouth.org)