

Lizella United Methodist Church, Inc.
Legacy Gift Confirmation Form

Name of Donor(s) _____

PART I: CONFIRMATION

Please describe the terms of your Legacy Gift.

A. Type of Endowment Gift:

I/We have provided for Lizella United Methodist Church through my/our:

- | | |
|--|---|
| <input type="checkbox"/> Will | <input type="checkbox"/> Trust |
| <input type="checkbox"/> IRA | <input type="checkbox"/> Insurance Policy |
| <input type="checkbox"/> Retirement Plan | <input type="checkbox"/> Other _____ |

B. Designation of Legacy Gift:

- General Endowment:** Please add my/our gift to the church's General Endowment Fund.
- Restricted:** Please add my/our gift to the _____ Endowment Fund. (Please see the attached list of endowed fund gift opportunities.)
- Named Endowed Fund:** Please establish an endowed fund in the following name _____, to be used as part of the General Endowment fund or the _____ Fund. (I/We understand that a minimum of \$20,000 is needed to endow a named Endowment Fund.)
- Unrestricted Gift to the Church (not an endowment gift):** Please give my/our gift to the church to be used as decided by the Church Finance Committee.
- Restricted Gift to the Church (not an endowment gift):** Please give my/our gift to the church to be used for _____.

C. My/Our Legacy Gift is in the following form and amount:

- Estimated Amount:** (List either fixed amount or a percent. Since estates fluctuate in value over time, designating a percentage of your estate vs. a dollar amount will maintain the proportionate value of your gift.)
Fixed Amount \$ _____ or Percent of the Estate _____%
- Cash:** Amount \$ _____ (This includes cash and other liquid assets.)
- Specific:** Property _____ (A specific Legacy Gift is one in which you designate specific assets to your church, such as real estate, artwork, stocks, bonds.)
- Residuary:** Estimated Amount \$ _____ (The church is bequeathed all or part of the remainder of your estate after other legacy gifts, debts, taxes and expenses have been paid.)
- Contingent:** Please attach the terms of the contingency to this form. (A legacy gift to the church takes place only if the beneficiaries named in your will predecease you.)

(over)

PART II ACKNOWLEDGEMENT Please let us know if/how we may recognize your generosity.

- YES, I/We give the church permission to publish my/our name(s) in church publications and donor acknowledgements. I/We understand that this will serve as an example for other faithful members to give.
- YES, please enroll me/us as a member(s) of the Lizella United Methodist Legacy Fellowship.
- How do you wish your name(s) to be listed in any publications that acknowledge your gift intention?

- I/We wish to remain anonymous.

While I/we fully intend to bless Lizella UMC as described above, I/we understand that I/we am/are NOT making a legal, or binding commitment by submitting this acknowledgement. Furthermore, the church should understand that the size of my/our future gift might be significantly different from the amount estimated above for the purposes of valuation.

Signed: _____ Date: _____

Signed: _____ Date: _____

Print Name(s): _____

Address: _____ Address: _____

Phone/email: _____ Phone/email: _____

Please return this completed confirmation form to:

Lizella United Methodist Church
Attn: LUMC Permanent Endowment and Planned Giving Ministry Committee
2920 South Lizella Rd.
Lizella, Georgia 31052

Current Listing of Endowed and Non-Endowed Funds and Minimum Giving Levels

<u>Name of Endowed Fund</u>	<u>Minimum Giving Level</u>
1. General Endowment Fund This is the main endowment fund for Lizella UMC which gives the latitude to use the proceeds from this fund in a way that best fits the current needs of the church and congregation.	\$1
2. Youth Ministry Fund	\$1
3. Children's Ministry Fund	\$1
4. Music Ministry Fund	\$1
5. Building and Grounds Fund	\$1
6. Missions Fund	\$1
7. Named Fund (in memory or honor)	\$20,000

Name of Non-Endowed Funds Minimum Giving Level

Same as Above