

UNITARIAN UNIVERSALIST CONGREGATION OF ASHEVILLE
LEGACY INTENTION FORM



Please note: This declaration of intent is revocable and nonbinding.

CONFIDENTIAL

Our Congregation is continuing to build an endowment and other funds to secure its future. We have formed a Legacy Circle to recognize and thank generous individuals who have remembered the Unitarian Universalist Congregation of Asheville (UUCA) in an estate plan, through a bequest, a charitable gift annuity, a life insurance policy, a trust, or other financial instrument.

The Legacy Circle honors donors by inscribing their names on the Legacy Scroll of Honor displayed in Sandburg Hall. The amount of your legacy gift need not be revealed. New donors will be added periodically to the Scroll as UUCA is notified of gifts. Donors may choose to remain anonymous. If you have remembered our congregation in your estate planning, you are welcomed into the Legacy Circle.

Name #1: _____ Birthdate: _____

Name #2: _____ Birthdate: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Email: _____

Yes, I/we have included the Unitarian Universalist Congregation of Asheville in my/our estate plans through my/our:

- | | | | | | |
|--------------------------|---------|--------------------------|----------------|--------------------------|-------|
| <input type="checkbox"/> | Will(s) | <input type="checkbox"/> | Trust | <input type="checkbox"/> | Other |
| <input type="checkbox"/> | IRA(s) | <input type="checkbox"/> | Life Insurance | | |

My/our legacy gift is:

- Unrestricted (for on-going needs and special initiatives)
- Endowment (principal held in perpetuity)
- Restricted (for the purpose of _____)

Why did you decide to become a member of our Legacy Circle?

Do you wish to remain anonymous? Yes No

Please print your name(s) exactly as it/they should appear on the Legacy Society Scroll of Honor:

Signature #1: _____ Date: _____

Signature #2 (if joint) : _____ Date: _____

Please return your completed form to UUCA Administration Office care of Becky Donald.

Revised May 2017