



First Parish in Concord

## LEGACY GIFT FORM

As evidence of my desire to provide a legacy of support to First Parish in Concord, I hereby inform First Parish in Concord that I have made provisions for a gift to First Parish in my estate plan. I understand that this commitment can be modified by me at any time.

Name: \_\_\_\_\_

Name: \_\_\_\_\_

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

City: \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

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

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

***I have made provisions to leave a gift to First Parish in Concord in my:***

Will                       Revocable Trust                       Life Insurance Policy

Retirement Plan Assets       Charitable Gift Annuity (Not revocable)

Other: \_\_\_\_\_

***Is this an unrestricted gift to be placed in the First Parish Legacy Investment Fund?***

Yes       No      If 'No', please explain any restrictions on the gift:

\_\_\_\_\_

***If possible, please share with us additional information about your gift.***

As of this date \_\_\_\_\_, the value of my gift is: \_\_\_\_\_

I am attaching the relevant pages of my will or a copy of my beneficiary designation form:

\_\_\_\_ Yes      \_\_\_\_ No

Name and contact information of your Estate Executor/Personal Representative:

\_\_\_\_\_

***How do you want your gift to be publically acknowledged?***

\_\_\_\_ Publish my/our name(s) as member(s) of the First Parish Legacy Circle in any church publications (e.g. Newsletter or Legacy Giving Brochure). (We recognize Legacy Circle members by name only. We do not disclose the amount or nature of your gift.)

My/our name(s) should be listed as: \_\_\_\_\_

\_\_\_\_ I/we would like this to be an anonymous gift. Please do not publish my/our name(s).

***Signatures of Legacy Gift Donor(s):***

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please notify First Parish if you make future changes or adjustments to your legacy gift.

**Thank you very much for your gift!**

The First Parish Legacy Giving Committee