



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 approximate 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:

Gift acknowledgement

People who make a legacy gift to First Parish automatically become members of the Legacy Circle. We recognize Legacy Circle members by name only. We do not disclose the amount or nature of your gift. May we list your name(s) as member(s) of the Legacy Circle?

____ Yes. My/our name(s) should be listed as: _____

____ No. We will list this as an anonymous gift and will not publish your 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