

Notification of Intent - Legacy Fund Planned Gift  
76 Bell Street, Chagrin Falls 44022  
440-247-6490  
[fedchurch@fedchurch.org](mailto:fedchurch@fedchurch.org)



I believe in The Federated Church's vision:

*With Christ at our center and surrounded by God's abundant love and grace, Federated Church thrives as a dynamic faith community for this generation and the next by: Engaging in extravagant invitation, welcome and inclusion, Fostering faith formation, Bringing forth transformational ministries, and Sharing our story.*

As evidence of my desire to provide a legacy of support to the church, I hereby inform The Federated Church that I have made provision for a gift to The Federated Church's Legacy Fund – its endowment fund - in my estate plan.

Donor Name (please print): \_\_\_\_\_

Gift Designation, if other than the church's Legacy Fund: \_\_\_\_\_

I have made provision(s) to benefit The Federated Church in the following manner:

- Provision in my will or revocable living trust
- Beneficiary designation in life insurance policy
- Beneficiary designation in my retirement plan (401(k), IRA, 403(b), Brokerage Account)
- Other Asset: \_\_\_\_\_

The current estimated value of my/our gift is \$\_\_\_\_\_. My/Our gift is \_\_\_\_\_% of the asset indicated above. If a percentage is given, what is the current estimated value of the percent in today's dollars \$\_\_\_\_\_. \* All benefits will be made payable to The Federated Church.

*\* I understand that by providing a current estimate of my estate gift, my estate is not legally bound by this statement and that I may choose to add, subtract, or revoke my estate gift at any time, in my sole and absolute discretion.*

Recognition:

- Information about the gift should be treated as **confidential** and **not listed** in any reports.

Estate Contact Information (although optional, the following information is very helpful):

Executor, Trustee (if your gift is through a Will, Trust):

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

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

City, State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

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

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

Administering Company (e.g., TIAA, Fidelity, etc., if your gift is through a retirement account or life insurance policy):

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

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

City, State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

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

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

Additional Contact/Relationship you may want us to know (family, attorney, etc.)

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

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

City, State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

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

\_\_\_\_\_  
**Donor Signature**

\_\_\_\_\_  
**Date**

**ACKNOWLEDGEMENT**

The undersigned, being the current Legacy Fund Committee Chair of The Federated Church, does hereby acknowledge this Notification of Intent - Legacy Fund Gift.

\_\_\_\_\_  
Peter R Franz, Legacy Fund Committee Chair

\_\_\_\_\_  
**Date**

For Office Use: Date Realm filed \_\_\_\_\_

Date Permanent Record Book filed \_\_\_\_\_