



Notification of Intent - Legacy Fund Planned Gift

Tax ID or EIN: 34-0714401

76 Bell Street, Chagrin Falls 44022

440-247-6490

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)) or Brokerage Account

Other Asset: _____

The current estimated value of my/our gift is \$_____.

My/Our gift is _____% of the asset checkmarked 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 an officer of The Federated Church, does hereby acknowledge this Notification of Intent - Legacy Fund Planned Gift.

Melissa Owen, Senior Director of People and Operations

Date

For Office Use: Date Realm filed _____

Date Permanent Record Book filed _____