



Westminster Presbyterian Church Legacy Gift Form

Westminster is grateful for your deep love for this faith community, as expressed by your plan to make a gift to the church in your will or estate. By making this gift, your support for the church and its future generations will carry forth in perpetuity. Please complete this confidential form and return it to Mary Hess, Director of Stewardship. This form serves as a way for the church to appreciate and recognize your generosity, and to honor your intentions and wishes for your gift.

DONOR INFORMATION

Name _____ Date of Birth _____

Second Name (if joint) _____ Date of Birth _____

Address _____

City, State, Zip _____

Home phone _____

Work phone _____

Email (s) _____

Professional Advisor _____ Phone _____

Executor _____ Phone _____

TYPE OF GIFT

It is my/our intent to leave a legacy gift through my/our: *(please check all that apply)*

Will (bequest) Retirement Account Life Insurance Policy Savings Account or CD

Charitable Remainder Trust Charitable Lead Trust Revocable Trust

Charitable Gift Annuity (Administered by) _____

Family Trust (Name) _____

Other _____

Comments _____

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CHARITABLE USE*

- My/our gift is unrestricted.
- It is my/our intention that my gift be used for the following purpose(s):

**Note: Westminster encourages unrestricted gifts for maximum flexibility to meet future needs.*

DONOR RECOGNITION

I /we understand that listing this gift may be an incentive for others to give, and I/we are willing to be acknowledged (name only). I/we wish my/our name to appear as:

Name

Name

- I/we wish to remain anonymous.

I/we understand that my/our estate is not legally bound by this statement, and I may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion. (Westminster Church respectfully requests notification of any changes or adjustments to your commitment). Please consult your attorney to ensure your estate planning documents legally and accurately reflect your wishes. (Westminster respectfully requests a copy of the relevant page of your estate-planning document if you are willing to share it.) See attached language to share with your attorney, if needed.

SIGNATURE(S)

| | | |
|-----------------------|--------------------|---------------|
| <i>(Printed Name)</i> | <i>(Signature)</i> | <i>(Date)</i> |
|-----------------------|--------------------|---------------|

| | | |
|-----------------------|--------------------|---------------|
| <i>(Printed Name)</i> | <i>(Signature)</i> | <i>(Date)</i> |
|-----------------------|--------------------|---------------|

**Please return this form to Mary Hess, Director of Stewardship
612-332-3421, ext. 263, or mhess@wpc-mpls.org**

Westminster Presbyterian Church · 1200 Marquette Avenue · Minneapolis, MN 55403
612-332-3421 · westminstermpls.org

A: UNRESTRICTED GIFTS – LANGUAGE FOR ATTORNEY

Language for a will: I give, devise and bequeath to Westminster Presbyterian Church, in Minneapolis, Minnesota, for its general charitable purposes [dollar amount][assets of my estate equal in value to _____] [__ percent of the residue of my estate].

Language for a revocable trust: The trustee shall distribute to Westminster Presbyterian Church, in Minneapolis, Minnesota, for its general charitable purposes [dollar amount][assets of my trust estate equal in value to _____] [__ percent of the residue of my trust estate].

B: RESTRICTED GIFTS – LANGUAGE FOR ATTORNEY

Language for a will: I give, devise and bequeath to Westminster Presbyterian Church, in Minneapolis, Minnesota, to be allocated to, and used in support of, the Westminster Endowment [dollar amount] [assets of my estate equal in value to _____][__ percent of the residue of my estate].

Language for a revocable trust: The trustee shall distribute to Westminster Presbyterian Church, in Minneapolis, Minnesota, to be allocated to, and used in support of, the Westminster Endowment [dollar amount] [assets of my trust estate equal in value to _____][__ percent of the residue of my trust estate].

C: RESTRICTED GIFTS TO SPECIFIC FUNDS WITHIN THE WESTMINSTER ENDOWMENT

Same as B above with the following addition. Further, this bequest is restricted to the _____ * Fund (s) of the Endowment.

*NOTE: The Endowment is comprised of the following Legacy Funds. If desired, Legacy Gifts may be restricted to one or more of these funds (though unrestricted gifts provide the most flexibility to the church):

- 1) Capital Legacy Fund
- 2) Annual Operating Legacy Fund
- 3) Program Legacy Funds

- Camp Ajawah Legacy Fund
- Meisel Scholarship Legacy Fund
- Mission (Faith in Action) Legacy Fund
- Music Legacy Fund
- Spiritual Life Discretionary Legacy Fund
- Town Hall Forum Legacy Fund
- Westminster Counseling Center Legacy Fund
- Women's Ministries Legacy Fund
- Gift of Grace Fund (Jason Carter)

The Federal Tax Identification Number for Westminster is 41-0695506.