



First Church Berkeley UCC

LEGACY CIRCLE MEMBERSHIP FORM

Please complete requested information.

As evidence of my desire to provide a legacy of support to First Congregational Church of Berkeley, UCC (“First Church Berkeley”), I/we hereby inform First Church Berkeley that I/we have made provisions for a gift to First Church Berkeley in my estate plan. I/we understand that this commitment can be modified by me/us at any time.

NAME

ADDRESS

CITY

STATE

ZIP

PRIMARY EMAIL

PRIMARY PHONE

Type of Gift:

- Bequest – Percentage gift or specified amount gift in will or revocable living trust**

Optional – enter type of gift, if non-cash (for example, real estate, stocks, etc.):

- Retirement Plan Assets (IRA, 401k or other account) – Designated Beneficiary**

Name of Plan: _____

- Life Insurance Policy – Designating First Church Berkeley as a beneficiary of policy**

Company Name: _____

Policy Number: _____

- Charitable Gift Annuity**

- Charitable Remainder Trust**

- Pooled Income Fund Gift**

- Real Estate – Describe:**

Other:

My gift is:

Unrestricted

Restricted Purpose: _____

All unrestricted gifts will be placed in the Church's General Endowment Fund. Restricted funds will be used as designated as long as the need exists and the means are available to fulfill the wishes of the donor. In the future, when those needs no longer fit the mission of the church, the funds will be added to the General Endowment.

Information about Gift (optional):

If possible, please share with us additional information about your gift. This information shall be held confidentially by the Church's ministers, Business Manager, and Treasurer.

As of this date _____, the approximate value of my gift is: _____.

I have attached the relevant pages of my will or a copy of my beneficiary designation form:

Yes

No

Gift Acknowledgement:

Those who make a legacy gift to First Congregational Church of Berkeley automatically become members of the Legacy Circle. We recognize Legacy Circle members by name only in the Church's annual report, and do not disclose the amount or nature of your gift. May we list your name(s) as member(s) of the Legacy Circle?

Yes

No

I wish to remain anonymous.

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

Signatures of Legacy Gift Donor(s):

Donor Signature: _____ Date: _____

Donor Signature: _____ Date: _____

Thank you very much for your legacy gift to First Church Berkeley!

Please notify First Church Berkeley if you make future changes or adjustments to your legacy gift. Please retain a copy of this form for your records, and send your completed Legacy Circle Form to:

First Congregational Church of Berkeley

2345 Channing Way

Berkeley, CA 94704

Attn: Kit Dunbar, Church Business Manager