

# Endowment Fund Program

Perry United Methodist Church -- Perry, GA

## Perry United Methodist Church Gift Confirmation Form

Name of Donor(s) \_\_\_\_\_

### PART I: CONFIRMATION

Please describe the terms of your Gift.

#### A. Type of Endowment Gift:

I/We have provided for PerryUnited Methodist Church through my/our:

- |  |   |
|--|---|
| <input type="checkbox"/> Will            | <input type="checkbox"/> Trust            |
| <input type="checkbox"/> IRA             | <input type="checkbox"/> Insurance Policy |
| <input type="checkbox"/> Retirement Plan | <input type="checkbox"/> Other _____      |

#### B. Designation of Gift:

<input type="checkbox"/>	<b>General Endowment:</b> Please add my/our gift to the church's General Endowment Fund.
<input type="checkbox"/>	<b>Restricted Fund:</b> Please add my/our gift to the existing _____ Endowment Fund. (Please see the attached list of endowed fund gift opportunities.)
<input type="checkbox"/>	<b>New, Named Endowed Fund:</b> Please establish an endowed fund in the following name _____, to be used as part of the General Endowment fund or the _____ Fund. (I understand that a minimum of \$50,000 is required to endow a named Endowment Fund.)

#### C. My/Our Gift is in the following form and amount:

Estimated Amount: (List either Fixed amount or a percent. Since estates fluctuate in value over time, designating a percentage of your estate vs. a dollar amount will maintain the proportionate value of your gift.)

- Fixed Amount** \$ \_\_\_\_\_ or Percent of the Estate \_\_\_\_\_ %
- Cash:** Amount \$ \_\_\_\_\_ (This includes cash and other liquid assets.)
- Specific:** Property \_\_\_\_\_ (A specific Gift is one in which you designate specific assets to your church, such as real estate, artwork, stocks, bonds.)
- Residuary:** Estimated Amount \$ \_\_\_\_\_ (The church is bequeathed all or part of the remainder of your estate after other legacy gifts, debts, taxes and expenses have been paid.)
- Contingent:** Please attach the terms of the contingency to this form. (For example: A gift to the church takes place only if the beneficiaries named in your will predecease you.)
- Other:** \_\_\_\_\_

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### PART II ACKNOWLEDGEMENT: Please let us know if/how we may recognize your generosity.

- YES, I give the church permission to publish my/our name(s) in church publications and donor acknowledgements. I understand that this will serve as an incentive for other faithful members to give. How do you wish your name(s) to be listed in any publications that acknowledge your gift intention? \_\_\_\_\_
- I wish my gift to remain anonymous.

I understand that I am NOT making a legal, or binding, commitment by submitting this acknowledgement. Furthermore, the church should understand that the size of my future gift might be significantly different from the amount estimated above for the purposes of valuation.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name(s): \_\_\_\_\_

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

Email(s): \_\_\_\_\_

Please return this completed confirmation form to:

**Perry United Methodist Church**  
**Attn: PUMC Endowment Committee**  
**PO Box 73**  
**Perry, GA 31069**

### Current Listing of Endowed Funds and Minimum Giving Levels

Name of Endowed Fund	Minimum Giving Level
<b>General Endowment Fund</b> This is the main endowment fund for Perry UMC, which gives the latitude to use the proceeds from this fund in a way that best fits the current needs of the church and congregation.	\$1
<b>Designated Sub-Funds</b> To be determined by Endowment Committee.	TBD