

CONFIDENTIAL

DECLARATION OF INTENT/COMMITMENT

PLANNED GIVING:

Unitarian Universalist Fellowship of Poughkeepsie

Planned Gift Form

Endowment Fund

Unitarian Universalist Fellowship of Poughkeepsie

67 South Randolph Ave

Poughkeepsie, NY 12601

845.471.6580 / office@uupok.org

Thank you for helping to ensure a solid future for our Fellowship through your planned gift. This private and confidential information will assist the Fellowship in making certain your wishes are realized. Specific information is available about the various types of giving so that you may consider each and select the vehicle that best fits your situation and interests. In addition, the Endowment Fund Committee is available to help you learn about different giving options, answer questions, and help you complete this form. The Fellowship and its Endowment Fund are qualified tax-exempt organizations.

PRINT THIS FORM, COMPLETE IT, MAIL TO: ENDOWMENT FUND COMMITTEE-CONFIDENTIAL, UUPF, 67 SOUTH RANDOLPH AVENUE, POUGHKEEPSIE, NY 12601

FOR ANY QUESTIONS: CALL THE UUPF OFFICE 845.471.6580

I / We recognize the positive work of the Unitarian Universalist Fellowship of Poughkeepsie and wish to support it in the future by making a commitment to the Endowment Fund.

CONFIDENTIAL Please continue and sign on the back of this form.

Type of Legacy gift:

- Will
 - Cash
 - Donation
 - Living / Revocable Trust (please specify name and date of trust)
 - Beneficiary of an IRA, 401K or other retirement / pension plan (please specify)
 - Beneficiary of a life insurance policy
 - Other Planned Gift, e.g. UUA Umbrella Giving Service, Pooled Income Funds and Charitable Remainder Trusts (please specify)
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DOCUMENTATION

Please enclose or attach a copy of your planned giving document(s) or a relevant excerpt that includes:

- The first page and signature pages.
- Declaration of intent/commitment
- The name and contact information of the estate administrator.
- Any information that might assist the Fellowship in following up on your planned gift.

SPECIFIC INFORMATION:

- Executor's or Successor Trustee's name, address, phone, email:

Please contact the Fellowship if there are any changes in your gift (s), giving intent, or to update contact information so that we may note these important changes. A member of the Endowment Fund Committee may periodically contact you to assure that our information is current.

DONOR INFORMATION

(Please print the following information):

Name(s) _____

Address _____

Phone _____

Email _____

Signature(s) _____

Date _____

Please return to:
Endowment Fund Committee
Unitarian Universalist Fellowship of Poughkeepsie
67 South Randolph Avenue
Poughkeepsie, NY 12601

NOTICE

***When arranging an estate gift, it is recommended that you contact
your attorney or financial advisor.***

If you have questions or would like additional information about including the Fellowship in your will or making other planned giving arrangements, please contact the Fellowship Office at 845.471.6580

Mailing Address:

Unitarian Universalist Fellowship of Poughkeepsie

ATTN: Endowment Fund Committee

67 South Randolph Avenue

Poughkeepsie, NY 12601