



David Anderson
Church Administrator
4515 16th Ave. NE
Seattle, WA, 98105
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Advisor's Guide for Giving

Gifts from Wills and Trusts:

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name University UCC in your will or trust please use the following suggested language:

Residual Bequest - A residual bequest comes to us after your estate expenses and specific bequests are paid.

I give and devise to University Congregational United Church of Christ (Tax ID #91-057311), located in Seattle, WA, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

Specific Bequest - Naming University UCC as a beneficiary of a specific amount from your estate is easy.

I give and devise to University Congregational United Church of Christ (Tax ID # 91-057311), located in Seattle, WA, the sum of \$ _____ (or asset) to be used for its general support (or for the support of a specific fund or program).

Contingent Bequest - University UCC can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled.

If (insert name) is not living at the time of my demise, I give and devise to University Congregational United Church of Christ (Tax ID # 91-057311), located in Seattle, WA, the sum of \$ _____ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).

Gifts of Appreciated Securities:

Please contact David Anderson for a stock transfer form.

Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to David Anderson.

Legal Name: University Congregational United Church of Christ

Tax I.D. Number: 91-057311

Incorporated In: Seattle, WA

Note to Attorneys, Accountants and other professional Advisors:

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please call David Anderson at 206-524-2322.

The information presented in this literature is not intended as legal or tax advice.



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Record of Planned Gift Intention

Thank you for completing this confidential Record of Gift Intention.
If you have any questions, please contact the Church Administrator, David Anderson at 206-524-2322.

Full Name: _____

Birth Date: _____

Daytime Phone: _____

Email Address: _____

Planned Gift (Bequest) Information

University UCC is named as a beneficiary of my will or trust:

For a specified amount of _____.

_____ percentage.

University UCC is named as a beneficiary of the following:

Retirement plan

Life insurance

Bank, investment or other account

Real property

Life-income plan (Trustee's name: _____)

My gift is (circle one) RESTRICTED/UNRESTRICTED

Signature: _____

Date: _____

Please return this form to: 4515 16th Ave. NE
Seattle, WA 98105