

The Living Legacy Circle

Confidential Charitable Intention Form

The Living Legacy Circle has been established to recognize donors of legacy gifts to the Old Presbyterian Meeting House. These gifts are intended to continue the church's work in the areas and manner designated by the donors.

This information will allow us to properly thank you for your support and provide you – if you so desire – with appropriate recognition. By completing this form, you are simply acknowledging your current plans to make a gift or bequest to benefit the Meeting house in the future and giving us guidance as to your wishes.

The Meeting House recognizes that gift plans may change over time, and your estate is not legally bound by submitting this form. We hope you will notify us of any relevant changes in your plans. We greatly appreciate your expression of support for the Meeting House's future and its important mission.

1. I/We, _____, have made provisions for the following planned gift(s) to the Old Presbyterian Meeting House:

<input type="checkbox"/> Bequest in Will	<input type="checkbox"/> Charitable Gift Annuity
<input type="checkbox"/> Individual Retirement Account	<input type="checkbox"/> Life Insurance
<input type="checkbox"/> Other: _____	

2. I/We intend for the funds derived from this gift to be directed into the following Legacy Fund administered by the Old Presbyterian Meeting House:

<input type="checkbox"/> General Legacy Fund (<i>recommended / unrestricted</i>)
<input type="checkbox"/> Church Missions Legacy Fund
<input type="checkbox"/> Worship, Education & Special Programs Legacy Fund
<input type="checkbox"/> Building and Grounds Legacy Fund

3. I/We intend for these funds to be administered as:
- ☐ An unrestricted fund – in which OPMH will use its discretion to utilize income and principal at the time and in the manner it thinks best. *(recommended)*
 - ☐ An endowed fund – in which only the income from the gift will be utilized, and the principal amount will remain in the fund.
4. A conservative estimate of the current value (a snapshot of today's value) of my/our provision is:
- \$ _____.
- ☐ I prefer not to share at this time.
5. Recognition: The Meeting House recognizes that estate planning is a highly personal matter. Only those donors who give permission will have their names listed, such as in the Annual Report, special publications or other donor recognition vehicles.
- ☐ I/We would like to be listed as a member of the Living Legacy Circle of the Old Presbyterian Meeting House, and would like for our names to be listed in the following manner:
- _____.
- ☐ I/We would prefer to remain anonymous at the present time.
6. I/We understand that the funds from this gift will be administered by the Session and Trustees of the OPMH pursuant to such investment and disbursement policies governing such gifts as have been promulgated and updated from time to time. I also understand that, should a time come when the Session, in consultation with the Trustees, determines that an extraordinary need for funds exists, the Session will be permitted, if at least 2/3 of the Session approves, to use these funds as necessary to address that extraordinary need regardless of the designations made above.
7. I/We would like for the Living Legacy Funds Annual Reports to be sent to:
- _____.

By signing, I reaffirm my commitment to the Old Presbyterian Meeting House and recognize the Meeting House as a fitting and capable steward of my legacy.

Signature

Date

Signature (for couples)

Date