



# Legacy Giving Declaration of Intent to Give

Your Legacy Gift will sustain the church ensuring  
your values flourish for generations to come.  
Thank you!

Name:

Address:

Email:

Phone:

If you know the type of bequest you plan to make, please specify:

- |   |  |
|---|--|
| <input type="checkbox"/> IRA  | <input type="checkbox"/> Life Insurance          |
| <input type="checkbox"/> Charitable Trust                                     | <input type="checkbox"/> Charitable Gift Annuity |
| <input type="checkbox"/> Stock  |  |
| <input type="checkbox"/> Employer Plan (401-K), defined contribution plan etc |  |
| <input type="checkbox"/> Other Asset  |  |

Other:

  
  
  
  

## CONTACTS

**Executor/Executrix: if applicable**

Name:

Address:

Email:

Phone:

**Attorney/Financial Planner: if applicable**

Name:

Address:

Email:

Phone:

**Family/Friend Contact: if applicable**

Name:

Address:

Email:

Phone:

I declare my intent to donate to First Unitarian Church of Dallas through my estate.

Signature:

Date:

Signature:

Date:



It is recommended you share your Intent to Give with family members, your Executor/Executrix and/or your attorney/financial planner.