

Gift in Will: As Easy as 1, 2, 3

Thank you for considering a gift in your will to [name of congregation]. Your investment will sustain the work of our congregation and leave a lasting impact on our community.

[name of congregation] partners with the [name of conference] to lift up an inclusive Christian message of hope, faith, and love. This partnership strengthens our congregation. Ten percent of unrestricted planned gifts will be shared with the [name of conference] to support our mutual mission and ministry.

The majority of estate gifts come as bequests because these gifts can be easily created as part of a will. You can also make a charitable bequest by designating [name of congregation], as the “payment on death” (POD) of a bank or stock account.

Making bequests to [name of congregation] is easy. As easy as 1, 2, 3:

1. When writing your will, decide if you want to make a bequest as either a **percentage** of your estate, a **specific dollar amount**, or **contingent** on the primary beneficiaries.

The standard wording for **percentage** bequest is:

“I give and bequeath _____ percent (_____%) of my estate to [name of congregation] [Employee Identification Number], having an office at [address].”

The standard wording for a **specific dollar amount** bequest is:

“I give and bequeath to [name of congregation] [Employee Identification Number], having an office at [address], the sum of _____ (\$_____).”

The standard wording for a **contingent** bequest is:

“If any or all of the above-named beneficiaries do not survive me, then I hereby give the share that otherwise would be theirs to to [name of congregation] [Employee Identification Number], having an office at [address].”

2. Next, include instruction on the purpose of your gift. [name of contact] will gladly answer questions about making a bequest and explain how your gift will impact our congregation.
3. Finally, share your story with the [name of church committee in charge of planned gifts or name of governing committee such as the council or consistory] and with the [conference]. We learn generosity from each other. Your story can inspire others to include a planned gift. The amount of your planned gift and the beneficiaries can of course remain anonymous, but other people will be encouraged to make a planned gift by hearing about you, and the hopes and gratitude that led you to make your gift.

Once you decide how to make your bequest, consult with your legal and/or financial advisor to make your bequest intention clear.

For more information about financial options, please contact:

[name of contact, phone and email address]