



**OUUC LEGACY GIFT FORM**

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_

I/We would like Olympia Unitarian Universalist Congregation (OUUC) to know of my/our intention to provide a **legacy gift**. I/we would like to be included in the OUUC Legacy Circle and meet at least one criterion listed directly below (please check all that apply):

Included OUUC in my/our estate plan

Named OUUC as a beneficiary in my/our:

- Will or Trust
- Life Insurance Policy
- Retirement Plan
- Donor Advised Fund
- Charitable Gift Annuity
- Other \_\_\_\_\_

My/Our gift is:

- Unrestricted
- Restricted specifically for: \_\_\_\_\_
- To support OUUC's Endowment Fund
- Not yet determined. Please contact me/us to discuss options.

The estimated value of my/our gift is:

- \$ \_\_\_\_\_
- % of my estate, currently valued at \$ \_\_\_\_\_ for OUUC.
- % of my retirement plan, currently valued at \$ \_\_\_\_\_ for OUUC.
- I/we prefer not to disclose at this time.

I/We wish to be referred to as \_\_\_\_\_ in donor recognition materials.

I/We prefer to remain anonymous and do not wish to be recognized publicly at this time.

If you wish for us to contact a personal representative after you have passed, please include their contact information here (name/phone/relationship): \_\_\_\_\_

Thank you for supporting OUUC. Please return this form to:

Business Manager  
 (360) 634-2005 x 105  
 BusinessManager@ouuc.org  
 Olympia Unitarian Universalist Congregation  
 2306 East End St. NW  
 Olympia, WA 98502