

## Confidential Bequest Intention Form

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

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

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

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

**My/our current intention is to include a testamentary gift to Irvine United Congregational Church (IUCCC) in my estate plans. I have made this through the following:**

I/we have named IUCCC as a beneficiary in a will or trust.

I/we have named IUCCC as a beneficiary in a:

IRA or other retirement plan

Life insurance policy

Bank and/or investment account.

Other (please specify): \_\_\_\_\_

### **Purpose of Gift to IUCCC:**

Unrestricted (Please use where needed most.)

Restricted to a specific program or purpose: \_\_\_\_\_

*If your gift is restricted, our staff will contact you to discuss how to maximize your impact with this estate gift.*

### **Recognition:**

***\*Estate planning is a highly personal decision, and we will only publicly recognize those who give us permission. Should you permit, your recognition will appear as members of the IUCCC Legacy Circle in our publications and on our Donor Wall.***

I/we would like others to be encouraged by my/our example and hereby give permission for my/our names to be published.

I/we would like to remain anonymous and prefer that my/our names not be published.

**I retain the right to modify my designation of IUCCC as a beneficiary, the purpose of my planned gift, and the portion and amount of my estate that will go to IUCCC.**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Please return to: Irvine United Congregational Church, Attn: Church Admin, 4915 Alton Pkwy, Irvine, CA 92604**

**or Email to: [iucc@iucc.org](mailto:iucc@iucc.org)**