

# Legacy Gift

## Confidential Letter of Intent

Please return to Jackie Lilly, Business Administrator.

This is to inform you that I intend to make a Legacy Gift to First Presbyterian Church.

(Please check below)

\_\_\_\_\_ I have included (or would like to include) the First Presbyterian Church in my will.

\_\_\_\_\_ I have included (or would like to include) the First Presbyterian Church as beneficiary or owner of a life insurance policy.

\_\_\_\_\_ I have included (or would like to include) the First Presbyterian Church as beneficiary of my IRA or retirement account.

\_\_\_\_\_ Other: \_\_\_\_\_  
\_\_\_\_\_

### Recognition

Please print your name below as you would like it to appear for any recognition.

\_\_\_\_\_

\_\_\_\_\_ I would like to give my gift anonymously.

### Personal Information

Print Name: \_\_\_\_\_

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

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

Telephone: \_\_\_\_\_

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

## **Please remember First Presbyterian Church in your estate plan.**

### **Charitable Giving through Wills**

1. You can include the First Presbyterian Church in your will by designating your contribution using the following language:

“I give \$ \_\_\_\_\_ to First Presbyterian Church, 16 Leon Sullivan Way, Charleston, West Virginia as a charitable gift.”

### **Charitable Giving through Life Insurance**

1. You can include the First Presbyterian Church as a beneficiary in your *current insurance policy* by requesting a change in beneficiary form. Complete the form by indicating amount or percentage you want designated to the First Presbyterian Church.
2. You can include the First Presbyterian Church as the beneficiary of a *new insurance policy* by contacting your insurance agent.
3. You can include the First Presbyterian Church as the owner and beneficiary of a *new insurance policy* by contacting your insurance agent.

### **Charitable Giving through IRA or Retirement**

1. You can include the First Presbyterian Church in your IRA or retirement plan by contacting your plan administrator.

**Note: Please always include the street address of the church (16 Leon Sullivan Way, Charleston, WV 25301) when designating the church as a beneficiary of your will, trust, IRA or life insurance policy.**

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**If you have any questions about including First Presbyterian Church in your estate plan or simply want to know more, please call any one of the following Planned Giving Committee Members:**

**Sandy Zando  
David Pitchford  
David Nolan**

**(304) 344-0688  
(304) 552-1839  
(304) 346-3700**

**Phil Hereford (304) 346-1800  
Terry Raab (304) 344-3425**