

## Estate Letter of Intent

As a reflection of my/our heart(s) to strengthen and sustain the ministry of our Church and to make an eternal impact on the Kingdom, I/we have made the following provisions in my/our estate plans:

### Gift Type:

- Will or Trust Provision
- Retirement Account Beneficiary Designation
- Life Insurance Policy Beneficiary Designation
- Charitable Remainder Trust Beneficiary Designation
- Other: \_\_\_\_\_

### This Provision is In the Form Of:

- A specific dollar amount: \$\_\_\_\_\_
- A percentage: \_\_\_\_\_%  
If based on a percentage, please estimate the current value: \$\_\_\_\_\_
- I/we prefer not to share at this time

Unless otherwise indicated, your gift will be directed toward the Church's greatest need. Any gift designation will be governed and protected via a Donor Agreement Letter that will be appended to this document.

- Please contact me about estate gift designation options

By signing this letter of intent, I affirm my commitment and future intentions to the Church's mission, vision, and values. This letter is not legally binding upon my estate and may be modified at any time. The information provided is confidential and for informational purposes only. Information will not be shared without your permission.

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

Date(s) of Birth: \_\_\_\_\_

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

### Future Contact for My Gift (Executor, Attorney, etc.)

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

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

Thank you for trusting the Church with your current and future giving as you faithfully steward all that God has entrusted to you! If you'd like more information about current giving strategies that can be made for tax advantaged purposes, please check the following:

- Appreciated Stock/Mutual Funds
- IRA Qualified Charitable Distributions
- IRA Required Minimum Distributions
- Real Estate
- Charitable Gift Annuities
- Donor Advised Funds
- Business Interests
- Other: \_\_\_\_\_

**Please return form to:**

**Woods Chapel UMC**  
**Attn: Joni Horn**  
**4725 NE Lakewood Way**  
**Lee's Summit, MO 64064**