



First Unitarian Church
 3701 Carlisle Blvd NE
 Albuquerque NM 87110
 505-884-1801

Estate Gift Intention Form

Please complete the following information so that we may properly thank you and know your wishes for your future gift to First Unitarian of Albuquerque. *Your information will remain confidential.*

Name(s) _____

Mailing address _____

City, State, Zip _____

Telephone (home) _____ (mobile) _____

E-mail address _____

Date(s) of Birth _____

Type of Gift

1. Will Living Trust Life Insurance Retirement Plan Charitable Trust Annuity Other
 (please provide details)

This gift is for the Endowment Fund or a gift for immediate church use
 This is a "contingent" gift. First Unitarian is an alternate beneficiary and will only receive the gift under certain circumstances. Please describe the circumstances: _____

Description of Gift

Please describe your gift to First Unitarian (for example: percentage of estate, any specific dollar amount, etc.)

Value of Gift

As of today's date, I estimate the value of this provision in my estate plan to be _____

Your Personal Representative

Name and Phone Number of the executor, attorney or someone else who is aware of this gift: _____

Purpose of Gift

Have you specified any restrictions for your gift? Yes No. If yes, please explain on the reverse of this form:

Signatures

I/We understand this is not a legal or binding commitment on my/our estate. First Unitarian should understand the size of this future gift may be significantly different from the amount estimated above. If for any reason in the future First Unitarian is no longer included in my/our estate plan, we will notify First Unitarian so that the records can be updated.

Signature(s) and Date
