

Alpharetta First United Methodist Church  
Confidential Legacy Gift Confirmation Form



Name of Donor(s) \_\_\_\_\_  
\_\_\_\_\_

**PART 1: CONFIRMATION** Please describe the terms of your Legacy Gift

**A. Type of Legacy Gift:**

I/We have provided for Alpharetta First United Methodist Church through my/our:

- |  |  |
|--|--|
| <input type="checkbox"/> Will            | <input type="checkbox"/> Trust (Revocable/Irrevocable) |
| <input type="checkbox"/> IRA             | <input type="checkbox"/> Insurance Policy              |
| <input type="checkbox"/> Retirement Plan | <input type="checkbox"/> Other _____                   |

**B. Designation of Legacy Gift:**

**For Endowment Fund: (only the income from the gift is used, the principal remains invested)**

- General Endowment:** Please add my/our gift to the church's General Endowment Fund.
- Named Endowed Fund:** Please establish an Endowed fund in the following name \_\_\_\_\_, to be used as part of the General Endowment fund or the \_\_\_\_\_ Fund. (I/We understand that a minimum of \$20,000 is needed to endow a named Endowment Fund.)

**Not for Endowment Fund: (all of the gift may be used)**

- Unrestricted Gift (not an endowment gift):** Please give my/our gift to the church to be used as decided by the Finance Committee with applicable Trustees and Church Council approvals.
- Restricted Gift for Operations (not an endowment gift):** Please give my/our gift to the church to be used for \_\_\_\_\_. (Please see the list of non-endowed designated gift opportunities at the end of this document.)

**C. My/Our Legacy Gift is in the following form:**

**Fixed amount or percentage:** (Since estates fluctuate in value over time, designating a percentage of your estate vs. a dollar amount may maintain the proportionate value of your gift.)

- Fixed \$ Amount**      **OR**       **Percent of the Estate** \_\_\_\_\_ %
- Cash or other liquid assets**
- Specific Property:** \_\_\_\_\_ (A specific Legacy Gift is one in which you designate specific assets to our church, such as real estate, artwork, stocks, bonds.)
- Residuary:** The church is bequeathed all or part of the remainder of your estate after other legacy gifts, debts, taxes and expenses have been paid.

**D. My/our Legacy Gift will be in the estimated amount:**

- \$ \_\_\_\_\_
- I/we prefer not to indicate the estimated amount.

**PART II ACKNOWLEDGEMENT** Please let us know if/how we may recognize your generosity.

- YES, I/We give the church permission to publish my/our name(s) in church publications and donor acknowledgements. I/We understand that this will serve as an example for other faithful members to give.
- YES, please enroll me/us as a member(s) of the Alpharetta First United Methodist Legacy Fellowship.
- How do you wish your name(s) to be listed in any publications that acknowledge your gift intention?  
\_\_\_\_\_
- I/We wish to remain anonymous.

While I/we fully intend to bless Alpharetta First UMC as described above, I/we understand that I/we am/are NOT making a legal, or binding commitment by submitting this acknowledgement. Furthermore, the church should understand that the size of my/our future gift might be significantly different from the amount estimated above for the purposes of valuation.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

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

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

Phone/email: \_\_\_\_\_ Phone/email: \_\_\_\_\_

Please return this completed confirmation form to:

**Alpharetta First United Methodist Church**  
**Attn: Financial Administrator**  
**69 N. Main Street**  
**Alpharetta, GA 30009**

**PART III Current Listing of Endowment and Non-Endowment Funds and Minimum Giving Levels.**

| <u>Endowment Funds</u> <i>(only the income from the gift is used, the principal remains invested)</i>   | <b>Minimum Gift</b> |
|---|---------------------|
| <b>1. General Endowment Fund</b>  | <b>\$1</b>          |
| This is the main endowment fund for Alpharetta First UMC. The distribution of the income from this fund is determined by the Legacy Ministry Committee. |                     |
| <b>2. Named Endowment Fund (in memory or honor)</b>   | <b>\$20,000</b>     |
| <u>Non-Endowment Funds</u> <i>(all of the gift may be used)</i>   | <b>Minimum Gift</b> |
| <b>1. General Fund for Operations</b> (Use decided by Finance Committee, Trustees and Church Council)   | <b>\$1</b>          |
| <b>2. Student Ministry Designated Fund</b>  | <b>\$1</b>          |
| <b>3. Music Ministry Designated Fund</b>  | <b>\$1</b>          |
| <b>4. Missions Designated Fund</b>  | <b>\$1</b>          |
| <b>5. Building and Grounds (Trustees Reserve) Designated Fund</b>   | <b>\$1</b>          |
| <b>6. Reduction of Debt Principal Designated Fund</b>   | <b>\$1</b>          |
| <b>7. Named Designated Fund (in memory or honor)</b>  | <b>\$20,000</b>     |