

**The Reverend Catie Scudera**, Minister  
**Mark LaPointe**, Director of Lifespan Religious Exploration  
**Irina Georgieva**, Director of Music  
**Susanna Whitman**, Parish Administrator

## First Parish in Needham Legacy Gift Form

As evidence of my desire to provide a legacy of support to First Parish in Needham, I hereby inform First Parish in Needham that I have made provisions for a gift to First Parish in my estate plan. I understand that this commitment can be modified by me at any time.

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

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

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

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

I have made provisions to leave a gift to First Parish in Needham in my:

\_\_\_ Will \_\_\_ Revocable Trust \_\_\_ Life Insurance Policy

\_\_\_ Retirement Plan Assets \_\_\_ Charitable Gift Annuity (Not revocable)

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

*Per First Parish's Gift Acceptance Policy, all legacy gifts will be placed in the First Parish Endowment fund.*

### Gift Acknowledgement

From time to time, First Parish may recognize those who have made Legacy commitments to the Church. *Recognition is by name only; we do not disclose the amount or nature of gifts.*

May we list your name(s) as Legacy Donors to First Parish?

\_\_\_ Yes. My/our name(s) should be listed as: \_\_\_\_\_

\_\_\_ No. If no, we will list this as an anonymous gift and will not publish your name(s).

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### Additional Information

If possible, please share with us additional information about your gift.

As of this date \_\_\_\_\_, the approximate value of my gift is: \_\_\_\_\_

I am attaching the relevant pages of my will or a copy of my beneficiary designation form:  Yes  No

If applicable, please provide the name and contact information of your Estate Executor/Personal Representative:

\_\_\_\_\_

You can increase the amount of your gift through the [Wake Now Our Vision Collaborative Campaign](http://wakenowourvision.org). In order to inspire new legacy gift commitments, a cash match made possible by a grant from the UU Congregation at Shelter Rock will be made for each commitment. Visit [wakenowourvision.org](http://wakenowourvision.org) for more details, and download the form to participate in the challenge.

I have provided information about my Legacy Gift to the UUA to qualify First Parish for a matching donation through the Wake Now our Vision Collaborative Campaign.

Yes  No

### Signatures of Legacy Gift Donor(s)

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

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

### Thank you very much for your gift!

Please notify First Parish if you make future changes or adjustments to your legacy gift.