

Planned Gift Form



1241 Ceres Drive
Lafayette, CO 80027
303-665-4280

PlannedGiving@BVUUF.org

Donor Information:

Name _____

Address _____

Phone _____

Email Address _____

Gift Information:

I am leaving a Planned Gift to the Boulder Valley Unitarian Universalist Fellowship, Tax ID 74-242 2895. I am completing this form for informational and planning purposes only. I understand that completing this form will not create a gift or bequest, but that I must also take additional actions such as creating a will, trust, or beneficiary designation as appropriate to the particular type of my gift.

My gift is (check one):

To the Legacy Fund

To the Endowment Fund

Other _____

(I have reviewed this purpose with Planned Giving Committee before completing the arrangements for this gift/bequest.)

The form of my gift is (check one)

a bequest in my will

a beneficiary designation of a trust

Name and Date of Trust _____

Trustee, Name and Contact: _____

a beneficiary of an insurance policy

Insurer and Policy Number _____

a beneficiary of a qualified retirement plan (i.e. IRA, 401(k), SEP)

Type of Account, Custodian, and last 4 digits _____

Gift through the UUA Pooled Income Fund

Gift through the UUA Charitable Gift Annuity Fund

Other Planned Gift _____

(I have reviewed this gift with Planned Giving Committee before completing the arrangements for this gift/bequest.)

Legacy Circle Membership:

BVUUF may announce my name as a member of the Legacy Circle

I prefer to remain an anonymous member of the Legacy Circle

Signature _____ Date _____