



Unitarian Society of New Haven

700 Hartford Turnpike, Hamden, Connecticut 06517
203.288.1807 www.usnh.org

Legacy Gift Intention

Including USNH in your gift planning helps assure a bright future for our faith community. All donors who plan legacy gifts, of any amount, that will benefit USNH in the future—such as including USNH in your will or trust—are entitled to membership in the **Legacy Society for USNH**. Donors who make gifts of \$10,000 or more over 1-3 years that are designated for the endowment also become Legacy Society members.

Name(s) _____

Address _____

Phone _____ Email _____

I/we have named USNH as the beneficiary of a legacy gift.

My/our gift is (select one of the following):

Restricted for endowment: gift amount permanently preserved, and only income and appreciation spent

Restricted for endowment, as above, and designated for the following purpose*:

If you are giving to the endowment, we strongly recommend that, in addition to completing this form, you specify your intention in your will, trust or other gift document, to ensure that your gift is restricted to the endowment.

Unrestricted

Not for the endowment, but for the following purpose*:

* If you would like to designate the purpose of your gift, please contact the Endowment and Legacies Committee so we can help you word your wishes so as to ensure that your intent will be honored when your gift is received.

The estimated value of my gift is approximately _____ as of (date) _____

I understand that this is an estimate only; my gift may be more or less.

You may include my/our name(s) on **Legacy Society for USNH** lists.

I/we prefer that my/our gift intention remains anonymous.

Signature _____ Date _____

Signature _____ Date _____

Options for Legacy Gifts

For your consideration in your planning, here are some options for a legacy gift to USNH:

- A gift for a percentage or a specific amount in your will or trust
- Designation of USNH as a beneficiary of an IRA or other retirement plan
- Designation of USNH as a beneficiary of a life insurance policy
- A Charitable Gift Annuity with the Unitarian Universalist Association (UUA) paying fixed quarterly lifetime payments to you, with the remainder value coming to USNH