

Updating and Changing Your Will, Trust, and/or other Testamentary Documents:

Your Will, Trust, and/or other Testamentary Documents should reflect the current circumstances of your life. The following are some life changes which may require your Will, Trust, and/or other Testamentary Documents to be reviewed, and possibly updated:

- a change in family status such as marriage, divorce, birth of a child or grandchild, or emancipation of a child;
- a change in the nature or value of your estate;
- a change in laws that affect estate planning; or
- a change in your place of residence from one state to another.

Your attorney can advise you on making or updating your Will, Trust, and/or other Testamentary Documents.

Please Note:

These arrangements are presented for the preliminary guidance of your legal and financial advisors. They are subject always to revision in accordance with requirements of the respective States' laws. Your attorney can advise on the laws in your State

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God is still speaking,
**UNITED CHURCH
OF CHRIST**



Suggested Bequest Arrangements and Forms For the United Church of Christ

Your gifts to the United Church of Christ (UCC) ensure the means to continue the mission, ministry and voice of the UCC far into the future. Members and friends are encouraged to make a bequest in a Will to benefit the UCC or a specific UCC ministry: local church, association or conference; United Church of Christ Board; or Covenanted, Associated or Affiliated UCC ministry.

Ways to designate the amount of your bequest:

- **Specific Dollar Amount**

"I give, devise, and bequeath to [legal name and address of institution – see examples, page 2], the sum of ____ **dollars** (\$____) [or other specifically described personal or real property] for its general uses and purposes." [A bequest for a particular purpose may be made by the addition of words either naming the Board, Committee, or Ministry Team within the entity to be benefited, or describing the purpose or area of work for which the bequest is to be used.]

- **Specific Percentage**

"I give, devise, and bequeath to [legal name and address of institution], an amount equal to ____ **percent** (____%) of the value of my gross or net estate at the time of my death for its general uses and purposes" [or particular purpose – see above].

- **Residual Bequest**

"I give, devise, and bequeath to [legal name and address of institution], all of the **residue** of my estate, both real and personal, for its general uses and purposes."

- **Contingent Bequest**

"If the above-named beneficiaries should predecease me, then I give, devise, and bequeath to [legal name and address of institution], all of my property and estate, both real and personal, for its general uses and purposes."

Legal Names and Addresses for Bequests to the United Church of Christ in Its Various Settings:

► **Churches, Associations, Conferences**

Contact the office of the particular entity for instructions as to precise legal name and address.

► **National Ministries**

- Unrestricted gifts to the United Church of Christ should be designated to “*The United Church of Christ Board*, a corporation duly organized and existing under the laws of the State of Ohio, located at 700 Prospect Ave. E, Cleveland OH 44115.” [Gifts to The United Church of Christ Board may be further designated to the UCC Endowment Fund, established in 2003.]
- “*Justice & Witness Ministries* (A Covenanted Ministry of the United Church of Christ), a corporation duly organized and existing under the laws of the State of Ohio, located at 700 Prospect Ave. E, Cleveland, OH 44115.”
- “*Local Church Ministries*” (A Covenanted Ministry of the United Church of Christ), a corporation duly organized and existing under the laws of the State of Ohio, located at 700 Prospect Ave. E, Cleveland, OH 44115.”
- “*Wider Church Ministries* (A Covenanted Ministry of the United Church of Christ), a corporation duly organized and existing under the laws of the Commonwealth of Massachusetts, located at 700 Prospect Ave. E, Cleveland OH 44115.”

► “**United Church Funds, Inc.** (An Associated Ministry of the United Church of Christ), a corporation duly organized and existing under the laws of the State of Connecticut, located at 475 Riverside Drive, New York NY 10115.”

► “**The Pension Boards - United Church of Christ, Inc.** (An Affiliated Ministry of the United Church of Christ), incorporated under the laws of the State of New Jersey, located at 475 Riverside Drive, New York NY 10115.”

Please Note:

If you intend to designate your bequest for a particularly detailed and specific use, it would be wise to contact the designee of your gift to confirm that your gift would be accepted under those conditions. Also, it may be possible to instruct that your bequest be invested by or for the designee and only the income used for the purpose you specify.

Bequest to Establish a Life-Income Gift for a Surviving Spouse or Other Persons:

Charitable Gift Annuity

“I give [\$__] or [__% of my disposable estate] to the United Church of Christ, through United Church Funds, Inc. (An Associated Ministry of the United Church of Christ), located at 475 Riverside Drive, New York NY 10115, which shall issue its standard form of Gift Annuity Agreement to [name of individual], by which it agrees to pay him/her an annual annuity, determined by multiplying the value of said amount so transferred, by the applicable annuity rate based upon his/her age at the date of my death. Upon [name of individual]’s death, the obligation to make annuity payments shall terminate, in accordance with the provisions of the Gift Annuity Agreement, and thereupon the bequest shall be available for the general [or specific] purposes of [legal name and address of charitable institution]. If [name of individual] shall predecease me, the said bequest shall be distributed outright to [legal name of charitable institution] to be used as indicated above.”

Pooled Income Fund

“I give [\$__] or [__% of my disposable estate] to the United Church of Christ, through United Church Funds, Inc. (An Associated Ministry of the United Church of Christ), located at 475 Riverside Drive, New York NY 10115, to acquire, with the value thereof, units in the Pooled Income Fund of United Church Funds under an agreement for the benefit of [name of individual]. The said agreement so established shall terminate upon the death of [name of individual], and thereupon the property represented by the units of the Fund shall be distributed, free from trust, to [name of charitable institution] to be used for its general [or specific] purposes. If [name of individual] shall predecease me, the said bequest shall be distributed outright to [legal name and address of charitable institution] to be used as indicated above. A copy of United Church Funds’ Pooled Income Fund Declaration of Trust, presently in existence, is attached hereto and is incorporated herein by reference.”

Charitable Remainder Trust

Wording for various types of Charitable Remainder Trusts will be provided upon request (see contact information on back of brochure).