

Legacy Bequest Notification

I/we want to let you know that (ministry name) _____ has been included in our estate plans.

Here are some important details or instructions concerning this bequest:

Note: Indicating the amount is optional.

Today's Date: _____

Name/s: _____

Email: _____

Phone: _____

Address: _____

This notification is not a pledge or legally binding, but is for informational purposes only and is based on current intentions and circumstances. All final bequests will be based on signed estate planning documents or bequests my family may choose to make in my memory.

You have permission to contact the following individuals to inquire about this legacy bequest after my/our homegoing:

Name/s: _____

Email: _____

Phone: _____

Permission is given to include my/our names as legacy givers to this ministry:

Yes No Use "Anonymous"



4 Action Steps for Your Legacy Wishes to be Honored

It is important to understand that this document is for planning purposes only. While this signed document may be helpful for your spouse or family to honor your bequest wishes, you will need to complete Step 4 to make your wishes legally binding.

STEP 1

Complete and sign the **Legacy Bequest Planning Form**. Ask your another person to sign to affirm your wishes.

STEP 2

Put this document with your legal records. As needed, share a copy of these bequests with trusted family member/s.

STEP 3

Send the **Legacy Bequest Notification** to those who are receiving bequests.

STEP 4

Option 1: Choose to name bequest recipient/s in beneficiary payouts of insurance policies or other accounts. No legal fees are required to do this.

Option 2: Share your wishes with an experienced Christian attorney, estate planner or financial expert. Request their assistance to incorporate your wishes into your estate plans and seek their counsel on the best way to maximize your gifts for bequests and loved ones while reducing taxes.

For further assistance, please contact our church or a Christian legal or financial professional.

Bless your Church and God's Work

Legacy Bequests

A helpful way to honor God with what he has given you over your lifetime



Bless Your Church is an initiative of NAE Financial Health, a project of the National Association of Evangelicals and denominations, designed to help congregations and Christians everywhere.

Dear church family,

Proverbs 3:9 says, "Honor the Lord with your wealth." The most generous gifts most people will ever be able to make to the Lord's work is in the later years of their lives or upon their homegoing to heaven. If you are open to honoring the Lord by remembering our church and other ministries with a planned gift or estate bequest, we invite you to prayerfully review and fill out the **Legacy Bequest Planning Form** (below) for your records.

In order to keep accurate church records, please send us a **Legacy Bequest Notification** (on the back). With your permission, we will include your name/s in our list of legacy givers at our church to encourage others to also include us in their planned giving or estate plans. Please contact the church office if you have questions or if we can serve you in any way.

Legacy Bequest Planning Form

As part of my homegoing to heaven, I would like to honor my Lord and Savior Jesus Christ. He is the one who gave me strength, abilities, possessions, relationships and financial resources over my lifetime. I now wish to advance God's work and lay up treasure in heaven through the following God-honoring bequests.

The finances needed for these bequests can come from the following source/s (circle):

- A** \$_____ Insurance Proceeds **D** \$_____ Retirement **G** \$_____ Memorial Donations
- B** \$_____ Bank Accounts **E** \$_____ Property Sales **H** \$_____ Sale of Possessions
- C** \$_____ Investments **F** \$_____ Assets **I** \$_____ Other _____

Additional details: _____

I prayerfully reflected on the following people and organizations that served me and my family, or that I supported in my lifetime (e.g., churches, ministers, missionaries, denominations, schools, camps, ministries, nonprofits, sponsored child, etc.) in making these bequests. I now have prayerfully chosen the following that I want to remember with a God-honoring legacy gift:

	Legacy Bequest for (List church, ministry, etc.)	Source (A to I)	Amount (\$ or %)	Indicate if funds are to be Undesignated (i.e., use where needed most) or for a specific purpose.
1				
2				
3				
4				

Any additional information or instructions that will be helpful concerning these bequests:

My Signature: _____ Date: _____ (Spouse should fill out own form if wishes are different.)

Affirmed with Signature of Spouse, Family Member or Friend: _____



God's Instructions

Honor God with everything you own;
give him the first and the best.

-PROVERBS 3:9 MSG

Everything we have has come
from you, and we give you only
what you first gave us!

-1 CHRONICLES 29:14 NLT

Lay up for yourselves
treasures in heaven.

-MATTHEW 6:20 ESV

Beware lest you say in your heart,
"My power and the might of my hand
have gotten me this wealth." You shall
remember the Lord your God, for it is
he who gives you power to get wealth.

-DEUTERONOMY 8:17-18 ESV

Each of you should give what you
have decided in your heart to give.

-2 CORINTHIANS 9:7 NIV

All must give as they are able,
according to the blessings given to
them by the Lord your God.

-DEUTERONOMY 16:17 NLT

Yes, each of us will give a personal
account to God.

-ROMANS 14:12 NLT

"Well done, good and faithful servant."

-MATTHEW 25:23 ESV