

Statement of Future Gift

Roseville Lutheran Church

As evidence of my/our desire to provide a legacy of ministry support to [Roseville Lutheran Church / Roseville Lutheran Church Endowment Fund], I/we have made a provision for a gift to [Roseville Lutheran Church / Roseville Lutheran Church Endowment Fund] in my/our estate plan, as described below:

Name(s)

Address City State ZIP

Preferred phone # Alternate Phone # Email

Gift Information:

I/we have made a provision for this gift through a: (check all that apply)

- Will or Trust IRA/retirement plan Life Insurance
Charitable remainder trust (please attach copy) Other (explain below)

Other

I/We Designate This Gift to:

1. Roseville Lutheran Church

The gift may be used for the general support of the mission of Roseville Lutheran Church, as the Church Council deems appropriate. (unrestricted)

To support and sustain the following Roseville Lutheran Church ministry area, staff position or restricted fund: (Restrictions must be approved by the Church Council)

ministry area, staff position or restricted fund

Estimated current value of my/our gift as of this date: \$ _____

2. Roseville Lutheran Endowment Fund

The gift may be used for the general support of the Roseville Lutheran Endowment Fund as the Endowment Committee deems appropriate. (unrestricted)

To support and sustain the following Roseville Lutheran Church ministry area, staff position or restricted fund. (Restrictions must be approved by the Endowment Committee and Church Council)

ministry area, staff position or restricted fund

Estimated current current value of my/our gift as of this date: \$ _____

Please provide other information you are willing to share, such as a copy of the gift provision for Roseville Lutheran Church and contact information for your personal representative or trustee. We understand the value and type of gift may change and would appreciate your letting us know of such changes. We will treat all of your information as confidential.

All contributors of future gifts become members of the Roseville Lutheran Church Legacy Society and

are identified in the Roseville Lutheran Church membership database.

Please publish my/our name(s) as follows:

Please do NOT publish my/our name(s).

This statement of a future gift is *not a binding commitment*, and I/we retain the right to change or revoke this gift at any time without notice Roseville Lutheran Church.

Contributor(s) signature(s)

Date

Accepted by::

RLC Finance Manager

Date

Statement of Future Gift Procedures

Created and Approved: March 2017

The Statement of Future Gift form is intended to be an informational document to Roseville Lutheran Church / Roseville Lutheran Endowment Fund of a donor's desire to name Roseville Lutheran Church/Roseville Lutheran Endowment Fund in their estate plan/Last Will and Testament. It is not a binding commitment.

Donor:

Complete the form and include additional documentation if necessary of the nature of the deferred gift. If you wish to meet with a pastor, RLC Finance Manager, and/or and Endowment Committee member, any one of them would be happy to discuss your intentions. A digital copy of the completed form and all additional documents will be stored as a part of your membership record.

If your estate plans change whereby Roseville Lutheran Church/Roseville Lutheran Endowment Fund is removed, notify Roseville Lutheran Church to have the documentation removed from your membership record.

Roseville Lutheran Church Office:

Upon receiving a signed Statement of Future Gift and supporting documentation, create a digital copy (PDF format) to then attach to the donor's membership record in the Roseville Lutheran membership database. Flag the membership record as being a member of the Legacy Society(RLC) or Legacy Society(EF) or Legacy Society(Both).

A specialized agent would be appointed/hired to administer gifts of real estate, businesses, or unique gifting arrangements. Two internal RLC representatives would be identified to administer and coordinate the gift on behalf of the Roseville Lutheran Church/Endowment Fund. The internal RLC representatives would be the Council President/Endowment Fund Board of Directors Chair and the RLC Senior Pastor or a Congregational Council designated person. Any expenses related to the hiring of the specialized agent would be charged against the donation.