



Legacy Fund
The Episcopal Church of the Resurrection
399 Gregory Lane, Pleasant Hill, CA 94523
(925) 685-2288

LEGACY SOCIETY MEMBERSHIP ACCEPTANCE FORM

Thank you for including the Legacy Fund of the Church of the Resurrection in your will or estate plan. When we receive your completed Membership Acceptance Form we will be pleased to activate your membership in the **Legacy Society**.

Name(s) _____

Address _____

City, State, Zip _____

Email _____ Phone _____

On the roll of the Legacy Society, I (we) wish my (our) name(s) to appear as

___ I (We) consent to my (our) name(s) appearing with others on the public roster of **The Legacy Society** as a means of encouraging others to consider a similar act of stewardship.

___ I (We) do not wish my (our) name(s) to appear with others on the public roster of **The Legacy Society** and prefer to remain anonymous.

___ Additionally, I (we) wish my (our) name(s) appearing with others on the public roster of **The Bishop's Society** as a means of encouraging others to consider a similar act of stewardship.

Signed _____

Date _____

over please

CONFIDENTIAL

1. I (We) have included a ministry of the Legacy Fund of the Church of the Resurrection in my (our) estate plan by means of:

- Bequest in will
- Beneficiary of revocable trust
- Beneficiary of IRA/401(k)/403(b) variable annuity/fixed annuity
- Charitable Gift Annuity
- Remainder beneficiary or irrevocable trust (CRT, etc.)
This beneficiary designation is revocable irrevocable.
- Beneficiary of life insurance policy
- Remainder interest in residence/real estate
- Other _____

2. The congregation and/or other ministries I (we) have remembered are:

3. I (We) **do** **do not** consent to these ministries being informed of our planned gift.

4. These ministries' positions as beneficiaries in this plan are primary contingent

5. The current value of this gift is approximately \$ _____

- I (We) do not know the value
- I (We) do not wish to disclose the value

6. I (We) have made lifetime gifts of at least \$10,000 to an Endowment Fund supporting a ministry of the Diocese of California.

Please return this form to the Church Office for the Rector in an envelope marked
“PERSONAL AND CONFIDENTIAL.”