

# Charitable **BEQUEST**



**ST. ANDREW  
PERMANENT  
ENDOWMENT**



**Your Gifts.  
Forever Invested.**

**St. Andrew Permanent Endowment**

5801 W. Plano Parkway | Plano, Texas 75093  
972.380.8001 | [standrewumc.org/endowment](http://standrewumc.org/endowment)

# CHARITABLE BEQUEST

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## A MOST GENEROUS GIFT

A will represents a person's final wishes and intentions. After providing for your loved ones, please consider making a final impact through a bequest in your Will or living trust that provides enduring support for the vital work of our church. For many of us, this will be the most significant gift we will make — our gift of a lifetime.

## TOOLS TO MAKE A BEQUEST

- If you have not done so, you need to make a Will or a living trust instrument. This is a significant and important undertaking.
- If you have a Will or living trust, you need to add a codicil to the present will or make an amendment to the present trust.

## TYPES OF BEQUESTS

- **Specific Bequests** | You may leave specific cash, securities or property.
- **Residuary Bequests** | You may gift the remaining balance or a set percentage of the estate after all specified distributions are made and obligations have been satisfied.
- **Contingent Bequests** | You may gift the estate if one or more of the beneficiaries does not survive the benefactor.

## NEXT STEPS

- Connect with us so that we can (1) ensure your intentions can be met, (2) share specific verbiage, and (3) thank you.
- Speak with your attorney to compose or amend your Will or living trust.

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**Thank you for considering this gift!**

*Please consult with your professional advisers on how this gift would fit into your plans.*

If you have questions, please contact the church business office: 214.291.8012.