

LETTER OF INTENT

I / We wish to provide a Forever Gift to the St. Andrew Permanent Endowment as part of my / our estate plan. It is my / our intention to make this Forever Gift through methods checked below.

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|-------------------------------------|--|---|--------------------------------|
| <input type="checkbox"/> Bequest | <input type="checkbox"/> Retirement Assets | <input type="checkbox"/> Charitable Lead Trust | <input type="checkbox"/> Other |
| <input type="checkbox"/> Cash | <input type="checkbox"/> IRA Rollover | <input type="checkbox"/> Charitable Remainder Trust | |
| <input type="checkbox"/> Securities | <input type="checkbox"/> Life Insurance | <input type="checkbox"/> Charitable Gift Annuity | |



For planning purposes only, as of this date of this instrument, the anticipated value of my / our Forever Gift is approximately \$ _____.

I / We understand that, by stating an amount, my / our estate is not legally bound by this statement, and at any time I / we may choose to add, subtract, or revoke the St. Andrew Permanent Endowment as beneficiary of this Forever Gift (with the exception of Charitable Gift Annuity). I / We understand that St. Andrew should be informed in the event of any changes or adjustments to this Forever Gift.

I / We would like for my / our Forever Gift to be:

- Unrestricted** | Provides maximum flexibility for St. Andrew Permanent Endowment to meet future needs.
 - Restricted** | \$250,000 minimum - Please use the space below to share your intentions with us so that we can ensure your Forever Gift has maximum impact, and consult your attorney so that your Forever Gift instructions can be recorded legally and accurately.
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All information contained in this letter of intent is strictly confidential and will be treated as such. Access to this letter and its contents shall be restricted to me / us, the St. Andrew Chief Operations Officer / Director of Endowments, and the St. Andrew Senior Pastor.

Legacy Society / Saltire Circle

The Legacy Society / Saltire Circle recognizes those who honor God by means of an estate plan Forever Gift to the St. Andrew Permanent Endowment. These gifts will provide enduring support to our Church for generations to come.

- Please enroll me / us in the Legacy Society / Saltire Circle (as defined in the Permanent Endowment Charter).
- My / Our names may be published as Legacy Society / Saltire Circle members.
- Please treat this as an anonymous gift.

NAME(S)

ADDRESS

CITY / STATE / ZIP

PHONE / EMAIL

SIGNATURE

DATE

SIGNATURE

DATE

Please give or send this completed letter to St. Andrew United Methodist Church, attention St. Andrew Chief Operations Officer / Director of Endowments.

St. Andrew Permanent Endowment

5801 W. Plano Parkway | Plano, Texas 75093 | 972.380.8001 | standrewumc.org/endowment