



## Confidential Statement of Bequest Intention

**Yes! I/We wish to leave a legacy gift to Calvary Presbyterian Church.**

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

All information indicated below is considered confidential and is only used to acknowledge and track legacy gift intentions. We recognize this gift is subject to change depending on personal circumstances. This form and the information provided does not qualify as a legally binding pledge.

Type of bequests and gift intentions: If you are willing to disclose, please provide the information requested below.

I / We have provided for the future of Calvary Presbyterian Church in the following manner:

- Bequest through will or trust
- Insurance policy
- Bequest of retirement plan assets
- Appreciated property
- Other: \_\_\_\_\_

I / We intend to leave:

- \$ \_\_\_\_\_ to Calvary Presbyterian Church (Tax ID 94-1167431)
- \_\_\_\_\_% of my estate assets to Calvary Presbyterian Church (Tax ID 94-1167431)
- \$ \_\_\_\_\_ to The Calvary Foundation (Tax ID 94-3368512)
- \_\_\_\_\_% of my estate assets to Calvary's Endowment (Tax ID 94-3368512)

**Sharing your intention confirms your membership in the Calvary Legacy Giving Circle. Membership is not mandatory and can be anonymous.**

- Yes, you have my/our permission to include my/our names in published lists recognizing Calvary Legacy Giving Circle members.

Please list me/our name(s) for recognition purpose as follows: \_\_\_\_\_

- No, I wish my/our bequest intention to remain anonymous.

Signature(s) \_\_\_\_\_

Date \_\_\_\_\_

Signature(s) \_\_\_\_\_

Date \_\_\_\_\_



**Please return by mail to Calvary Presbyterian Church, 2515 Fillmore Street, SF, CA 94115 attn: Legacy Giving**



## Bequest Language

These words may be used by your attorney for inclusion in your will or trust documents. Note: Calvary members and friends are advised to consult with their own attorney or tax advisor for all financial planning decisions.

### Sample Bequest Language (Calvary Presbyterian Church)

I give and bequeath to Calvary Presbyterian Church (Federal Tax Identification Number 94-1167431), a California religious nonprofit corporation, (the sum of \$ \_\_\_\_\_) or (\_\_\_\_\_ percent of the residue of my estate) or (the residue of my estate). This gift shall be paid to Calvary for the benefit of Calvary Presbyterian Church, currently located at 2515 Fillmore Street, San Francisco, CA 94115, telephone number: (415) 346-3832, and shall be used in accordance with the policies and procedures exercised under the direction of the Session.

### Sample Bequest Language (The Calvary Foundation)

I give and bequeath to Calvary Foundation (Federal Tax Identification Number 94-3368512), a California religious nonprofit corporation, (the sum of \$ \_\_\_\_\_) or (\_\_\_\_\_ percent of the residue of my estate) or (the residue of my estate). This gift shall be paid to Calvary for the benefit of Calvary Foundation, currently located at 2515 Fillmore Street, San Francisco, CA 94115, telephone number: (415) 346-3832, and shall be used in accordance with the policies and procedures exercised under the direction of the Board of Trustees.

Though you may choose to remain anonymous, when you step forward, others are encouraged to do the same. We thank you for the gift you have already provided or are considering to support the ministries and mission of Calvary Presbyterian Church.