

Alpharetta First Methodist Church, Inc.
Confidential Legacy Gift Confirmation Form



Name of Donor(s) _____

PART 1: CONFIRMATION

Please describe the terms of your Legacy Gift

A. Type of Legacy Gift:

I/We have provided for Alpharetta Methodist through my/our:

- | | |
|--|--|
| ☐ Will | ☐ Trust (Revocable/Irrevocable) |
| ☐ IRA | ☐ Insurance Policy |
| ☐ Retirement Plan | ☐ Other _____ |

B. Designation of Legacy Gift:

For Endowment Fund: (*only the income from the gift is used, the principal remains invested*)

- ☐ **General Endowment:** Please add my/our gift to the church's General Endowment Fund.
- ☐ **Named Endowed Fund:** Please establish an Endowed fund in the following name _____, to be used as part of the General Endowment fund or the _____ Fund. (I/We understand that a minimum of \$20,000 is needed to endow a named Endowment Fund.)

Not for Endowment Fund: (*all of the gift may be used*)

- ☐ **Unrestricted Gift (not an endowment gift):** Please give my/our gift to the church to be used as decided by the Finance Committee with applicable Trustees and Church Council approvals.
- ☐ **Restricted Gift for Operations (not an endowment gift):** Please give my/our gift to the church to be used for _____. (Please see the list of non-endowed designated gift opportunities at the end of this document.)

C. My/Our Legacy Gift is in the following form:

Fixed amount or percentage: (Since estates fluctuate in value over time, designating a percentage of your estate vs. a dollar amount may maintain the proportionate value of your gift.)

- ☐ **Fixed \$ Amount** **OR** ☐ **Percent of the Estate** _____ %
- ☐ **Cash or other liquid assets**
- ☐ **Specific Property:** _____ (A specific Legacy Gift is one in which you designate specific assets to our church, such as real estate, artwork, stocks, bonds.)
- ☐ **Residuary:** The church is bequeathed all or part of the remainder of your estate after other legacy gifts, debts, taxes and expenses have been paid.

D. My/our Legacy Gift will be in the estimated amount:

- ☐ \$ _____
- ☐ I/we prefer not to indicate the estimated amount.

PART II ACKNOWLEDGEMENT Please let us know if/how we may recognize your generosity.

- ☐ YES, I/We give the church permission to publish my/our name(s) in church publications and donor acknowledgements. I/We understand that this will serve as an example for other faithful members to give.
- ☐ YES, please enroll me/us as a member(s) of the Alpharetta Methodist Legacy Fellowship.
- ☐ How do you wish your name(s) to be listed in any publications that acknowledge your gift intention?

- ☐ I/We wish to remain anonymous.

While I/we fully intend to bless Alpharetta Methodist as described above, I/we understand that I/we am/are NOT making a legal, or binding commitment by submitting this acknowledgement. Furthermore, the church should understand that the size of my/our future gift might be significantly different from the amount estimated above for the purposes of valuation.

Signed: _____ Date: _____

Signed: _____ Date: _____

Print Name(s): _____

Address: _____ Address: _____

Phone/email: _____ Phone/email: _____

Please return this completed confirmation form to:

Alpharetta Methodist Church
Attn: Director of Finance & HR
69 N. Main Street
Alpharetta, GA 30009

PART III Current Listing of Endowment and Non-Endowment Funds and Minimum Giving Levels.

Endowment Funds (*only the income from the gift is used, the principal remains invested*) **Minimum Gift**

- 1. General Endowment Fund** **\$1**
This is the main endowment fund for Alpharetta Methodist Church. The distribution of the income from this fund is determined by the Legacy Ministry Committee.
- 2. Named Endowment Fund (in memory or honor)** **\$20,000**

Non-Endowment Funds (*all of the gift may be used*) **Minimum Gift**

- 1. General Fund for Operations** (Use decided by Finance Committee, Trustees and Church Council) **\$1**
- 2. Student Ministry Designated Fund** **\$1**
- 3. Music Ministry Designated Fund** **\$1**
- 4. Missions Designated Fund** **\$1**
- 5. Building and Grounds (Trustees Reserve) Designated Fund** **\$1**
- 6. Reduction of Debt Principal Designated Fund** **\$1**
- 7. Named Designated Fund (in memory or honor)** **\$20,000**