

Unitarian Universalist Congregation of Fairfax
Notification of Bequest

Date:

Name:

Email:

Home address:

Phone number:

Date of birth:

Social Security Number:

Bequest is in which of the following: Will Revocable Trust Other

Please check appropriate box: Outright Bequest Contingent Bequest

Approximate value of gift: \$

Purpose of gift (see next page for descriptions of each funding option):

Grants Endowment Fund

General Endowment Fund

Wherever needed most

Other donor-designated purpose

Execution date of will/trust:

Attorney of record:

Phone:

Address:

Executor of estate:

Phone:

Address:

Relation to you:

I have attached a photocopy of the relevant portion of my will or revocable trust.

Please return this form to:

Gayathri Tillekeratne, UUCF Finance Manager, P.O. Box 130 Oakton, VA 22124

Grants Endowment Fund

This is a principal-restricted, distributable income fund managed by the Endowment Fund Committee, used for member- and committee-initiated projects and other needs apart from normal operations.

General Endowment Fund

This is a principal-restricted, distributable income fund administered by the Endowment Fund Committee and used for highest-priority organizational needs as determined by the UUCF Board of Directors.

Wherever needed most

There are no restrictions on use of the principal. These funds will be applied wherever the board, in consultation with the UUCF Coordinating Team (CT), agrees is the highest priority.

Other donor-designated purpose

If a donor specifies a purpose other than one of the above, the board, in consultation with the CT, will decide whether the donor's designation can be accepted. If not, the UUCF Generosity Team would engage the donor (if possible) in a conversation about mutually agreeable alternatives.