



# CHRIST CHURCH LEGACY SOCIETY

## Declaration of Intent

The Christ Church Legacy Society honors those who make an investment in the future ministry of Christ Episcopal Church, Sausalito, California by including Christ Episcopal Church in their estate plans for any amount or through cumulative lifetime gifts of \$10,000 to the Christ Church Legacy Fund.

I (we) accept the invitation to join fellow supporters of Christ Episcopal Church, Sausalito, California, in becoming a member(s) of the **Christ Church Legacy Society**.

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

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

On the roll of the Christ Church Legacy Society, I (we) wish my (our) name(s) to appear as:

\_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

I (we) consent for my (our) name(s) to appear with others on the public roster of the Christ Church Legacy Society.

I (we) do not wish my (our) name(s) to appear with others on the public roster of the Christ Church Legacy Society.

\_\_\_\_\_

### CONFIDENTIAL

1. I (we) have included Christ Episcopal Church in my (our) estate plan by means of:

- Bequest in will     Beneficiary of revocable trust
- Beneficiary of IRA/401(k)/403(b)/variable annuity/fixed annuity/donor advised fund
- Charitable Gift Annuity
- Remainder beneficiary of irrevocable trust (CRT, etc.)
  - This beneficiary designation is  revocable  irrevocable
- Beneficiary of life insurance policy
- Remainder interest in residence/real estate
- Other \_\_\_\_\_

2. Christ Episcopal Church's position as beneficiary in this plan is:  Primary  Contingent

3. The current value of this gift is approximately: \$ \_\_\_\_\_

- I (we) do not know the value.
- I (we) do not wish to disclose the value.

4.  I (we) have made lifetime gifts of at least \$10,000 to an Endowment Fund of Christ Episcopal Church.

Please return this form to the Rector of Christ Episcopal Church or email it to the parish office at [christchurchsausalito@sbcglobal.net](mailto:christchurchsausalito@sbcglobal.net)

**Thank you very much!**

Your gift to Christ Episcopal Church will be a blessing to many for generations to come.  
Federal Tax ID: 94-1415295