

## Bequests to the United Church of Gainesville

Including the United Church of Gainesville (UCG) as a bequest in your estate plan is an effective way to support the mission of the church. A bequest helps ensure the church's future success. It also qualifies as a charitable gift under federal estate tax laws.

Most bequests are unrestricted, permitting the church to use them wherever they are most needed. However, bequests exceeding \$100,000 may be directed to supporting a specific UCG mission as long as the bequest is approved by the senior minister.

It is not difficult to prepare a bequest. Bequests may begin by writing, "I hereby give, devise and bequeath to the United Church of Gainesville, a qualified charitable organization currently located at 1624 NW 5th Avenue, Gainesville, Florida 32603, ..." The preceding statement may be completed by writing one of the following:

1. "...an amount equal to \_\_\_\_\_% of my gross estate, as determined for federal estate tax purposes, for deposit in the church's endowment fund."
2. "...the sum of \$\_\_\_\_\_ dollars for deposit in the church's endowment fund."
3. "...all the rest, residue and remainder of my estate, both real and personal, after distribution to all living heirs, for deposit in the church's endowment fund."
4. "...the following properties:\_\_\_\_\_ (stocks, bonds, securities, or real estate) for deposit in the church's endowment fund."

Note: if you wish to designate UCG as a beneficiary to a retirement account or a life insurance policy, you do not need to include your wish in your will; you may simply name the United Church of Gainesville as your designated beneficiary.

Your charitable bequest must be signed by you as the settlor/testator and two adult witnesses. It should also contain a self-proving statement signed by you and the same two witnesses who watched you sign the Will or Trust stating that you signed the will and the witnesses signed as witnesses all in the presence of each other. Finally, the aforementioned signatures should be witnessed and signed by a State of Florida notary public.

This document has been reviewed and approved by a Florida Bar licensed attorney.

If you have questions about preparing a bequest, please contact your attorney.