

**Permanent Endowment Committee  
The Legacy Society of UU Santa Fe  
EIN: 85-0291946**

Please return to the office or by mail (to UU Santa Fe, P. O. Box 4637, Santa Fe, NM 87502-4637; ATTN: PEC)

Please use this form to notify the Permanent Endowment Committee of your intention to leave a legacy gift to UU Santa Fe and become a member of the Legacy Society. **This information is confidential and will be used only by the Committee and Finance.**

- Yes, I/we intend to include the Permanent Endowment Fund in my/our estate planning documents, as confirmed by the signature(s) below. I/we pledge to inform our estate planning attorney/financial advisors of this intention.
- Yes, I/we have already included the Permanent Endowment Fund in my/our estate planning documents, as confirmed by the signature(s) below.

To help the Permanent Endowment Committee plan and manage the Permanent Endowment Fund it is helpful to know the value of the gift.

- This gift is for a specific amount of \$ \_\_\_\_\_
- This gift is a percentage that will have an approximate value of \$ \_\_\_\_\_
- This gift is specific property that will have an approximate value of \$ \_\_\_\_\_
- The value of the gift is unknown or I/we prefer not to disclose the value.

**How can you take a leadership role?** When others see that you intend to or already have included the Permanent Endowment Fund in your estate planning, many others may follow your lead.

- Yes, you have my/our permission to include my/our name(s) in any Legacy Society member listings.
- Please do not print my/our name

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Name: \_\_\_\_\_  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Email: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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Contact (Personal Representative, Lawyer, close relative)

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Email: \_\_\_\_\_  
Telephone: \_\_\_\_\_

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Please keep this for your records and/or provide this to your estate representative:

Unitarian Universalists Santa Fe, P. O. Box 4637, Santa Fe, NM 87502-4637; ATTN: PEC  
Aaron Leventman, Adminstator, PH: 505-982-9674  
EIN: 85-0291946

Pledge amount: \$ \_\_\_\_\_, Date of Pledge: \_\_\_\_\_