

Permanent Endowment Committee
The Legacy Society of UU Santa Fe

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

Please use this form to notify the Permanent Endowment Committee of your intention to make 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.

How can you take a leadership role? You can also help us by allowing your name(s) to be included in a listing of Legacy Society members. 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

Name _____

Name: _____

Address: _____

City: _____ **State:** _____ **Zip:** _____

Email: _____

Telephone: _____

Signature: _____ **Date:** _____

Signature: _____ **Date:** _____

Contact (Personal Representative, Lawyer, close relative)

Name: _____

Address: _____

City: _____ **State:** _____ **Zip:** _____

Email: _____

Telephone: _____