

St. Barnabas Endowment Fund Declaration of Intent

To help ensure the work of St. Barnabas and to enable the parish to fulfill its mission more completely by developing its ministries beyond what is possible through its annual operating funds, I/we have made a planned gift to the Endowment Fund of the St. Barnabas Episcopal Church, Montgomery, Ohio.

The estimated value of this planned gift is _____.

___ I/We are providing/will provide for the endowment in my/our estate or deferred giving plans, in the following way(s):

___ Will

___ Living Trust

___ Charitable Remainder Trust

___ Life Insurance

___ Retirement Plan Assets

___ Other (Please specify) _____

___ I/We have yet to determine the exact nature of my/our gift in our final will or estate plans, but intend to do so.

___ I/We give the Church permission to publish my/our name(s) in the Legacy Circle Registry Book and other church publications.

Please list my/our name(s) as follows: _____.

___ I/We wish to remain anonymous.

Please give a brief statement as to your reasons for giving to St. Barnabas: _____

Signature of Donor/Date

Printed Name

Signature of Donor (if more than one)/Date

Printed Name

Home Address _____

Home phone _____ Work phone _____

E-mail _____

Please return this form to the church office.

Thank you for your generous commitment! Note, this form does not legally bind you to the commitment. It simply notifies St. Barnabas Church of your intention to make a planned gift. St. Barnabas urges all prospective donors to consult with your attorney, financial and/or tax advisor before making your gift.