Endowment Fund Letter of Intent

Name(s)_____

Address_____

City_____ State_____ Zip Code_____

Phone_____ Email_____

(please print legibly)

□ New Intention
□ Updated Intention

PREFERENCES

Below is an incomplete list of ways to make a gift to United Methodist Men Foundation/Wesleyan Foundation for Men.
Your planned gift of support is not limited to the avenues listed here.

I/We wish to provide a planned gift of support and will make a provision for a gift to United Methodist Men Foundation/Wesleyan Foundation For Men (UMMF/WFM) in my/our estate plans. It is my/our intention to leave a planned gift to UMMF/WFM through my/our:

□ Will or Trust

□ Charitable Lead Trust

□ Life Insurance Policy

□ Retirement Plan/Beneficiary Designation (401(k) 403(b), IRA, Keogh, Brokerage Account)

□ Charitable Remainder Trust

□ Donor Advised Fund Remainder

□ Other Asset(s) (please describe): _____

_____

_____

FOR PLANNING PURPOSES

I/We would like to inform UMMF/WFM, for long-term planning purposes only, that, as of this date, the estimated value of my/our gift is $ _____ or _____ % of my/our estate. I/We understand that my/our estate is not legally bound by this statement and at any time I/we may choose to add, subtract, or revoke UMMF/WFM as beneficiary of this planned gift.

IF AN UPDATE IS NEEDED

United Methodist Men Foundation/Wesleyan Foundation For Men greatly appreciates notification in the event that you make a change or adjustment to this gift. Please send updated information to: **UMMF/WFM, 810 12th Ave. South, Nashville, TN, 37203 or to Mlubbock@ummf.org.**

GIFT PURPOSE

You may designate your gift to one or multiple funds. If you prefer your gift to be split into multiple funds, please provide percentages or specific amounts.

□ Unrestricted - Provides for the most pressing long-term needs of UMMF/WFM.

$ _____ / _____ %

□ Heritage Fund – Supporting expansion of foundation grants for our core Vision and Mission.

$ _____ / _____ %

□ Scouting & Youth Ministries Fund – Supporting activities for youth that build a strong Spiritual Center in their lives.

$ _____ / _____ %

□ Outreach Fund - Identifying and responding to local and global missions.

$ _____ / _____ %

YOUR WORDS MATTER

There are other passionate advocates of UMMF/WFM like you; would you help us inspire them? When you share your reasons for giving, your words may help someone envision the joy of making a commitment to our Foundation.

"I made a gift to UMMF/WFM through my Estate Plan because: _____

_____

_____

_____

_____"

□ You may use my/our name. □ Please share anonymously.

When completed, please send this form via mail to:

UMMF/WFM, 810 12th Ave. South, Nashville, TN 37203

or make a PDF and email to Mlubbock@ummf.org.

If you would like to discuss this commitment or have questions regarding the form, please contact the Executive Director (225)-252-3331