

**ST. PAUL'S UNITED METHODIST CHURCH
BEQUEST PROVISIONS**

A gift to St. Paul's United Methodist Church shows your confidence that we will continue to fulfill our mission to LOVE God and all others unconditionally, SEEK answers to our questions, and SERVE God by serving others.

The provisions in your Last Will and Testament or Living Trust for making a gift to St. Paul's United Methodist Church will depend upon the type of gift that you want to make and your personal circumstances.

You or your attorney may want the following information to prepare your estate documents. The Church's legal name is St. Paul's United Methodist Church and the tax ID number is 48-0979169.

These model provisions may be helpful in preparing your estate documents.

UNRESTRICTED SPECIFIC AMOUNT GIFT

I give to St. Paul's United Methodist Church of Lenexa, Kansas the sum of \$_____ for its unrestricted use.

UNRESTRICTED PERCENTAGE GIFT

I give to St. Paul's United Methodist Church of Lenexa, Kansas, ____% of my gross estate (or ____% of my gross estate less my funeral and administrative expenses).

You will need to decide how the gift is to be calculated. Is it based on the gross estate, without any deductions, or after certain expenses have been deducted.

GIFT FOR A SPECIFIC PURPOSE

I give to St. Paul's United Methodist Church of Lenexa, Kansas the sum of \$_____ (or ____% of my gross estate) to be used for _____ (specify purposes).

In making a gift for a specific purpose, you need to make sure the purpose is generally shared by the church, and would reasonably be considered as necessary in the future for the church. The less restrictive a gift is to the church, the church can use the gift for its greatest needs at that time or in the future. You also might want to consider adding language to allow the church to change the purpose of the gift if necessary. This language could be added: In the event that the Charge Conference of St. Paul's United Methodist Church determines that the specified purpose of my gift is no longer practical or necessary for St. Paul's United

Methodist Church, then the Charge Conference may designate a new use for the gift or any remaining portion of the gift at that time.

SPECIFIC BEQUEST: Naming St Paul's UMC as a beneficiary of a specific amount from your estate is easy;

I give all my shares of XYZ Corporation that I own at the time of my death (or other specific asset, such as real estate, certificates of deposit, automobile, etc.) to St. Paul's United Methodist Church of Lenexa, Kansas for its unrestricted use (or for a specific purpose).

RESIDUARY BEQUEST: A residual bequest comes to us after your estate expenses and specific bequests are paid;

All the rest, residue and remainder of my estate, both real and personal, I give to St. Paul's United Methodist Church of Lenexa, Kansas for its unrestricted use (or for a specific purpose)

CONTINGENCY GIFT: St Paul's UMC can be named as a contingent beneficiary in your Last Will & Testament or personal Trust if one or more of your specific bequests cannot be fulfilled;

I give, bequeath and devise to my spouse, if he/she survives me, all the rest, residue and remainder of my estate, wherever situated. In the event that my spouse does not survive me, I give, bequeath and devise all the rest, residue and remainder of my estate, wherever situated, to St. Paul's United Methodist Church of Lenexa, Kansas, for its unrestricted use (or for a specific purpose).

RETIREMENT PLAN: St. Paul's UMC can be named as a beneficiary or contingent beneficiary of your retirement plan. Your plan administrator should be able to provide guidance on how to include St. Paul's as a beneficiary.

Please contact Pastor David Livingston or a member of the Legacy Fund Program Committee if you have any questions about the Legacy Fund Program.

These materials are provided for informational use only, and are in no way intended to constitute legal advice. Please consult an attorney with questions relating to your estate plan.