



## Declaration of Bequest Intention

By completing this form you signify your intention to name St. Andrew's Presbyterian Church of Newport Beach (SAPC) as a beneficiary of your estate. SAPC understands that all bequest provisions are revocable and that any intentions stated here are not binding on you or your estate. We are deeply grateful for your generosity.

I have named SAPC as a beneficiary of: (Check as many as apply)

- My Last Will and Testament
- Retirement Account
- Revocable Trust (Living Trust)
- Charitable Trust
- Life Insurance Policy
- Donor Advised Fund
- Other (please specify) \_\_\_\_\_

My provision(s) names SAPC as:

- Primary Beneficiary
- Secondary Beneficiary
- Contingent Beneficiary

My current intention is to include SAPC in our estate plan in the following manner:

- Outright bequest (fixed dollar amount): \$ \_\_\_\_\_
- Percentage of the estate: \_\_\_\_\_ %, estimated current value of the portion: \$ \_\_\_\_\_

If/when this gift is received by SAPC, it is my wish that the organization use my gift for the following purpose:

- General Purposes/Area of Greatest Need
- Other \_\_\_\_\_

Signature \_\_\_\_\_ Printed Name \_\_\_\_\_ Date \_\_\_\_\_

To facilitate our ability to honor the intentions set forth above, we would greatly appreciate a copy of your Will or Trust (or appropriate sections thereof) for safekeeping in our confidential files. Thank you.



## Sample Bequest Language

The provision in your will or revocable living trust providing for a gift to St. Andrew's Presbyterian Church of Newport Beach should reflect your own unique circumstances and charitable objectives. We hope these samples will be helpful to you and your attorney.

Unrestricted Gift: "I, (name), of (city, state, ZIP), give, devise and bequeath to St. Andrew's Presbyterian Church of Newport Beach (written amount or percentage of the estate or description of property) for its unrestricted use and purpose."

Gift for a Specific Purpose: "I, (name), of (city, state, ZIP), give, devise and bequeath to St. Andrew's Presbyterian Church of Newport Beach (written amount or percentage of the estate or description of property) for the following purpose: [a specific purpose, such as supporting a particular program of the Church]. If at any time in the judgment of the Church it is impossible or impracticable to carry out the purpose I have designated, the Church shall determine an alternative purpose as near as possible to the designated purpose."

Gift from Investment or Retirement Accounts: You may choose to designate St. Andrew's Presbyterian Church of Newport Beach as beneficiary of all or part of your investment account or retirement account. The form may ask for SAPC's tax identification number, which is 95-1969024, and address (located below).

For information or additional assistance, please contact: Jon Batarse, [jonb@sapres.org](mailto:jonb@sapres.org)

or 949.574.2226.

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