



Trust Fund of Endowments STATEMENT OF INTENT

I/We are pleased to indicate that First UU of San Antonio is a beneficiary in my/our estate.

I / We acknowledge that this is only a Declaration of Intent, not a legally binding commitment.

All information submitted on this form is strictly optional. Information will be held in confidence by trustees of the Trust Fund. Please let us know if you have additional privacy concerns.

My/our gift provision is set forth in my/our:

___ Will/Trust ___ Mutual Funds ___ Financial account ___ Insurance Policy Other: _____

Please include my/our name(s) in the Legacy Society as:

Your name(s) _____

Address: _____ City, State, Zip: _____

Phone: _____ Email: _____

Signature(s): _____

Any expression of present intention in the above may be changed by us at any time, and creates no legally enforceable obligation.

Estimated level of giving: ___ Under \$10,000 ___ \$10,001 to 25,000 ___ \$25,001 to 50,000
___ \$50,0001 to \$100,00 ___ Over \$100,000

Please fill out the following, *if applicable*:

___ I/We will request that our attorney or Executor send First UU of San Antonio a copy of the appropriate document(s).

Attorney's Information (optional)

Executor Information: (optional)

Name: _____ Name: _____

Address: _____ Address: _____

City, St, Zip: _____ City, St, Zip: _____

Phone: _____ Phone: _____

Email: _____ Email: _____

All undesignated estate funds will be given to the Trust Fund of Endowments.