

Today's Date: _____

UNITARIAN CHURCH IN CHARLESTON
PLANNED GIVING LETTER OF INTENT-BEQUEST

Name: _____ Birth Year: _____
(Please Print)

Phone: _____ Email: _____

Name: _____ Birth Year: _____
(Please Print)

Phone: _____ Email: _____

Address: _____

Amount of anticipated bequest: (\$ or % of bequest) _____

Management of the endowment funds below is accomplished by the Endowment Investment Board (EIB) of the Unitarian Church in Charleston. A copy of the policies and procedures is available upon request.

Unrestricted Endowment (General Non-Operating Fund) ☐ % of total _____

Restricted Endowment

Building Fund ☐ % of total _____

Fullarton Churchyard Fund ☐ % of total _____

Hearth Music Fund ☐ % of total _____

Luski Social Justice Fund ☐ % of total _____

Management of the endowment funds below is accomplished by the Coastal Community Foundation (CFF). A copy of the policies and procedures is available upon request.

Operating Endowment Churchyard Maintenance Fund (includes Memorial Walkway) ☐ % of total _____

Bowling Operating Endowment Fund ☐ % of total _____

Type of bequest: Please check all those that apply, with either monetary amount (\$) or percentage (%) of bequest estimated.

Will	☐ % of total _____	Charitable Remainder Trust	☐ % of total _____
Real Estate	☐ % of total _____	Revocable Living Trust	☐ % of total _____
Insurance Policy	☐ % of total _____	IRA or Retirement Plan	☐ % of total _____

Designation of your bequest in legal documents must read **"Unitarian Church in Charleston Endowment"** to eliminate confusion with other entities.

Have you designated your gift to be used for any other specific purpose inside the church?
(If yes, please briefly explain.)

Is your request contingent? (A contingent bequest comes to the church only if all other named beneficiaries do not survive you.) ☐ No ☐ Yes (If yes, please explain)

Recognition of your Bequest

The Gilman Legacy Builders recognizes future benefactors by providing a sticker and pin to be worn if you wish.

After their death(s) and once the gift has been received by The Church, donors become members of the **Samuel and Caroline Gilman Society**. They are honored by inscription of their name(s) on the Donor Wall located in the northwest corner of the courtyard in front of the church entrance.

Name(s) for my gift should be listed as:

- ☐ I/we would like my/our name(s) to be inscribed on the Donor Wall.
- ☐ I/we prefer to remain anonymous in perpetuity

Signature: _____ Date: _____

Name: _____
(Please Print)

Signature: _____ Date: _____

Name: _____
(Please Print)

Please return this form to the Unitarian Church in Charleston, attention: Planned Giving, 4 Archdale Street, Charleston, SC 29401. For questions, please call the church office at 843-723-4617 or email office@charlestonuu.org

The information contained on this form is a statement of intention and does not constitute a legally binding obligation on either party. We also understand that circumstances change, and your gift may therefore change as well. If you do make significant changes to your bequest, we respectfully ask that you notify the church.

Last modified 9-18-2026