

## Church Gifts from Wills and Trusts

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name Plymouth Church in your will or trust the following language is suggested:

**Residual Bequest** – A residual bequest comes to Plymouth after your estate expenses and specific bequests are paid.

*I give and devise to Plymouth Congregational Church of Lawrence, Kansas, (Tax ID #48-0548367), located in Lawrence, Kansas, all (or state a percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund, endowment fund or to be added to the endowment fund account).*

**Specific Bequest** – Plymouth Church is named as a beneficiary of a specific amount from your estate.

*I give and devise to Plymouth Congregational Church of Lawrence, Kansas, (Tax ID #48-0548367), located in Lawrence, Kansas, the sum of \$\_\_\_\_\_ (or asset) to be used for its general support (or for the support of a specific fund, endowment fund or to be added to the endowment fund account).*

**Contingent Bequest** – Plymouth Church can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled.

*If (insert name) is not living at the time of my demise, I give and devise to Plymouth Congregational Church of Lawrence, Kansas, (Tax ID #48-0548367), located in Lawrence, Kansas, the sum of \$\_\_\_\_\_ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund, endowment fund or to be added to the endowment fund account).*

### **Gifts of Appreciated Securities:**

Please contact the Financial Clerk at Plymouth Church for a stock transfer form.

### **Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:**

Please contact your plan provider for a change of beneficiary form. After the form is completed, please send to the Financial Clerk at Plymouth Church.

**Legal Name:** Plymouth Congregational Church of Lawrence, Kansas

**Tax ID Number:** 48-0548367

**Incorporated in:** Lawrence, Kansas

Note: This information is not intended as legal or tax advice and you should not rely on it as being legally sufficient to satisfy your individual requirements to provide a gift to Plymouth Church. Since tax and other laws constantly change, we strongly recommend that your gift be made only after you have obtained legal and tax advice.



Established in 1854

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