



## Legacy Intention

PLEASE KEEP A COPY OF THIS DOCUMENT FOR YOUR RECORDS  
AND SEND ONE TO YOUR ATTORNEY.

The Foundation, a separate 501(c)(3), operates solely for the support and benefit of First Unitarian of Portland and its mission. By including The Foundation in your Will or Estate Plan you are helping ensure a strong and vibrant Beloved

Community for generations to come and inspiring fellow congregants to do the same!

By completing this form and returning it to us, you become a member of our Legacy Society!

Full Name Person 1:

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Full Name Person 2:

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Check here if you would like your Legacy Intention to remain anonymous. (But please know that the Foundation would very much appreciate adding your name to our published list of Legacy Society members.)

Please be advised that I have made the following provision(s) for a **designated bequest** to the **First Unitarian Church of Portland Foundation Tax ID #43-1968342** in the form of:

- A Bequest in my Will or my Trust [Excluding gifts designated to complete an Operating Pledge]
- A Beneficiary Designation on my Retirement Accounts or my Life Insurance (or Annuity) Program
- Another Income or Residual provision in another financial instrument
- Other Planning Documents: \_\_\_\_\_

I hereby give permission to the Ministers or Staff of the **First Unitarian Church of Portland** and/or the **First Unitarian Church of Portland Foundation** to contact my family, executors or administrators of my Will or Estate Plan.

Please contact:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone/Email: \_\_\_\_\_

**This is a non-binding intention form.**

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Signature

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Signature

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Date