

A planned gift is one you make during your lifetime, but which benefits an organization after your death – a bequest in your will is the most common example. Your bequest to Irvine United Congregational Church helps to ensure that our mission, ministry and voice are carried far into the future.

Irrevocable Bequest by Will

Revocable bequests are a generous and deeply appreciated way to support IUCC; however, they *cannot* be counted toward our campaign goal. Only irrevocable bequests can be counted. Please include both the church name and address in your irrevocable bequest: Irvine United Congregational Church, located at 4915 Alton Parkway, Irvine, CA 92604.

Please contact your legal advisor for guidance on making an irrevocable bequest – as part or all – of your campaign pledge. If you plan to restrict your irrevocable pledge to the *Embracing the Future* campaign, please include a sentence that allows the funds to be reallocated if the capital campaign is fully funded. Such language may read: “In the event the phase I capital campaign is fully funded, Irvine United Congregational Church’s Administration Board may allocate this gift to other needs, including to master plan phases II or III.”

Revocable Bequest by Will

Designate Irvine United Congregational Church as primary or contingent beneficiary. Bequest language may be as follows:

Specific Dollar Amount

“I give, devise, and bequeath to Irvine United Congregational Church, located at 4915 Alton Parkway, Irvine, CA 92604, the sum of _____ **dollars** (\$ _____) [or other specifically described personal or real property] for its general uses and purposes.” [A bequest for a particular purpose may be made by the addition of words either naming the Board, Committee, a specific program or ministry within IUCC to be benefitted, or describing the purpose or area of work for which the bequest is to be used.]

Specific Percentage

“I give, devise, and bequeath to Irvine United Congregational Church, located at 4915 Alton Parkway, Irvine, CA 92604, an amount equal to _____ **percent** (____%) of the value of my gross or net estate at the time of my death for its general uses and purposes” [or particular purpose - see above].

If you so choose, please notify the church office that you have included IUCC in your will. If you plan to restrict your revocable pledge to the *Embracing the Future* campaign, please include a sentence that allows the funds to be reallocated if the capital campaign is fully funded. Such language may read: “In the event the phase I capital campaign is fully funded, Irvine United Congregational Church’s Administration Board may allocate this gift to other needs, including to master plan phases II or III.”

Additional information may be found at the United Church of Christ Office of Philanthropy and Stewardship website: www.ucc.org/giving/

Please note that the information included in this document does not constitute legal and/or tax advice. The IUCC Capital Campaign Team encourages you to consult with your accountant and/or legal advisor as you consider making your generous commitment to our capital campaign through any of the ways to give cited in this document.