



1015 Old Roswell Road
Roswell, GA 30075

BEQUEST INTENTION FORM

Thank you for your bequest to St. David’s Episcopal Church. We encourage you to communicate your intention by completing this form. We understand that some types of gift expectancies are revocable and other types are irrevocable. **Completing this form is not binding on you or your estate.** This information will greatly assist us in planning for the future and give us an opportunity to acknowledge your gift during your lifetime, if you so desire.

Donor Information

Donor’s Name: _____ Date: _____

Donor’s Address: _____
(Street) (City) (State) (Zip)

Donor’s Email: _____ Phone: _____

Bequest Information

- I have included St. David’s Episcopal Church in my/our will or living trust.
- I have named St. David’s Episcopal Church as a beneficiary in my/our:
 - IRA Retirement Plan Life Insurance Policy
- I/We have established the following split-interest gift for the benefit of St. David’s Episcopal Church:
 - Charitable Gift Annuity Pooled Income Fund Charitable Remainder Trust
 - Charitable Lead Trust Other, please specify: _____

- The bequest is in the specific amount of \$ _____; OR
- The bequest is a percentage worth approximately \$ _____
(Please provide your best estimate of the value of your future gift, based on the approximate current value.)
- I/We wish to keep the value of the bequest private at this time.

The bequest is to be used for:

- St. David’s Episcopal Church Operating Fund (to be designated by the Vestry)
- St. David’s Episcopal Church Endowment Fund
- A specific purpose at St. David’s Episcopal Church: _____

- I/We have communicated my/our wishes to member(s) of my/our family. Yes No
If yes, to whom? _____

Donor Recognition

- I/We wish to be recognized/acknowledged for this gift. I/We would like to be recognized as:
Name(s): _____
- I/We wish to remain anonymous.
- This gift is in thanksgiving for: _____
- This gift is in memory of: _____

For more information, email the Funding Future Ministry Committee at: fundingfuture@stdavidchurch.org.