

Suggested Bequest Language

Please share the following suggested bequest language with your attorney to assist in drafting a will or revocable trust to designate Unitarian Universalist Congregation (UUC) in Blacksburg, Virginia as a beneficiary of your estate.

Unrestricted Gift I give to the [Unitarian Universalist Congregation located in Blacksburg, Virginia] [___% of my estate or the sum of \$_____] for its general purposes.

Restricted Gift I give to the [Unitarian Universalist Congregation, located in Blacksburg, Virginia], [___ % of my estate or the sum of \$_____] to be used for [stated purpose]. If at any time in the judgment of the organization's board of trustees it is deemed impossible or impracticable to carry out the above purpose, said trustees shall determine a purpose as near as possible to that description above.

Beneficiary Designation Consider naming Unitarian Universalist Congregation in Blacksburg, Virginia as the beneficiary of your existing account in a donor advised fund, a retirement plan, IRA account, or a life insurance policy.

Retirement Plan Information

Type:

Traditional IRA Roth IRA 401(k) 403(b)

Other _____

Name of account holder

Name of plan administrator (e.g. brokerage firm, bank or mutual fund)

Contact information

Account number

Approximate value _____

Primary beneficiaries _____

Contingent beneficiaries _____