



Legacy Fund  
The Episcopal Church of the Resurrection  
399 Gregory Lane, Pleasant Hill, CA 94523  
(925) 685-2288

## LEGACY SOCIETY MEMBERSHIP ACCEPTANCE FORM

**Thank you** for including the Legacy Fund of the Church of the Resurrection in your will or estate plan. When we receive your completed Membership Acceptance Form we will be pleased to activate your membership in the **Legacy Society**.

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

On the roll of the Legacy Society, I (we) wish my (our) name(s) to appear as

\_\_\_\_\_

\_\_\_ I (We) consent to my (our) name(s) appearing with others on the public roster of **The Legacy Society** as a means of encouraging others to consider a similar act of stewardship.

\_\_\_ I (We) do not wish my (our) name(s) to appear with others on the public roster of **The Legacy Society** and prefer to remain anonymous.

\_\_\_ Additionally, I (we) wish my (our) name(s) appearing with others on the public roster of **The Bishop's Society** as a means of encouraging others to consider a similar act of stewardship.

Signed \_\_\_\_\_

Date \_\_\_\_\_

*over please*

**CONFIDENTIAL**

1. I (We) have included a ministry of the Legacy Fund of the Church of the Resurrection in my (our) estate plan by means of:

- Bequest in will
- Beneficiary of revocable trust
- Beneficiary of IRA/401(k)/403(b) variable annuity/fixed annuity
- Charitable Gift Annuity
- Remainder beneficiary or irrevocable trust (CRT, etc.)  
This beneficiary designation is  revocable  irrevocable.
- Beneficiary of life insurance policy
- Remainder interest in residence/real estate
- Other \_\_\_\_\_

2. The congregation and/or other ministries I (we) have remembered are:

\_\_\_\_\_

\_\_\_\_\_

3. I (We)  **do**  **do not** consent to these ministries being informed of our planned gift.

4. These ministries' positions as beneficiaries in this plan are  primary  contingent

5. The current value of this gift is approximately \$ \_\_\_\_\_

I (We) do not know the value

I (We) do not wish to disclose the value

6.  I (We) have made lifetime gifts of at least \$10,000 to an Endowment Fund supporting a ministry of the Diocese of California.

Please return this form to the Church Office for the Rector in an envelope marked  
**"PERSONAL AND CONFIDENTIAL."**