



UNITY of SANTA ROSA

4857 Old Redwood Highway

Santa Rosa, CA 95403

707-542-PRAY (7729)

www.UnityofSantaRosa.org

10:30am Sunday Service & Sunday School

Planned Giving Program

Planned Giving Notification Form

As an expression of my commitment to Unity of Santa Rosa, I take pleasure in notifying the church that I have included a planned gift in my estate plans to benefit the mission, vision and future of Unity of Santa Rosa.

Date my planned gift was signed: _____

Type of planned gift arrangement:

A bequest in my will

Attorney's Name _____

Attorney's Address _____

A Living Trust

Life insurance policy

Insurance company _____ Policy number _____

IRA or other retirement fund

Financial Company _____ Account number _____

Other:

Other details:

I would like my gift to be used to support:

Unrestricted, at the discretion of the Board of Trustees

A specific endowment purpose, as stated:

Though this notification is an expression of my current plans, I understand that I may modify or revoke it and that this is not a legal obligation binding me or my estate.

Full Name: _____

Address: _____

City/State/Zip: _____

I give my permission to include my name on your list of planned giving donors.

Signature: _____ Date: _____