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**CONFIDENTIAL BEQUEST REPLY FORM**

Date:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name (1) □ Please list as Anonymous

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name (2) □ Please list as Anonymous

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Address City State Zip

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email (1) Cell Home

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Email (2) Cell Home

□ Yes, First Parish Milton is in my/our estate plans:

--- Yes, I am interested in making a gift and would like to talk with a Legacy Committee contact with questions. You may also contact the Church Administrator, Susan DeMinico, at manager@fpmilton.org.

**My/our estate plans concerning First Parish include donations of:**

□ Outright Bequest (in will) □ Life Insurance Policy

□ Retirement Plan Beneficiary □ Revocable Trust

□ Charitable Remainder Trust □ Testamentary Trust

□ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

□ I/we do not wish to share the details of our estate plans at this time.

Percentage/Estimated Amount of intended donation (*optional*):%\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

□ Unrestricted

□ Restricted (*please specify*)  
\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
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Is there anything else you would like us to know about your estate plans concerning First Parish? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Signature (1) Date

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Signature (2) Date

I would like my name to appear on a list thanking those who have made a legacy commitment to First Parish: \_\_ Yes \_\_ No

**There are a wide variety of options you can consider to plan a legacy gift to First Parish. It is recommended that you and your family consult financial advisor or an estate attorney to discuss which options are best for you. We do not offer financial advice.**

*Thank you for supporting the future of First Parish!*

*You can return this form by emailing Susan DeMinico at* [*manager@fpmilton.org*](mailto:manager@fpmilton.org)*, or by mailing to the office at First Parish Milton, attn: Legacy Giving, 535 Canton Ave, Milton MA 02186.*