

**Confidential Documentation of Intent**

**The Legacy Giving Circle of the  
Old Presbyterian Meeting House**

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**The Legacy Giving Circle of the Old Presbyterian Meeting House has been established to recognize donors of legacy gifts to the Meeting House. These gifts are intended to continue to work of the Meeting House in the areas and in the manner designated by the donors.**

**The following is to record my intentions with regard to my Living Legacy Gift:**

**1. I \_\_\_\_\_ have made provisions for the following planned gift(s) to the Old Presbyterian Meeting House:**

- ( ) Bequest in Will                      ( ) Charitable Gift Annuity**
- ( ) Individual Retirement Account      ( ) Life Insurance**
- ( ) Other: \_\_\_\_\_**

**2. I intend for the funds derived from this gift to be directed into the following Legacy Fund administered by the Old Presbyterian Meeting House:**

- ( ) OPMH Church Missions Legacy Fund**
- ( ) OPMH Worship, Education & Special Programs Legacy Fund**
- ( ) OPMH Building and Grounds Legacy Fund**
- ( ) The OPMH General Legacy Fund**

**3. I intend for these funds to be administered as:**

**( ) An endowed fund – in which only the income from the gift will be utilized, and the principal amount will remain in the fund in perpetuity .**

**( ) An unrestricted fund – in which the OPMH will use its discretion to utilize income and principal in this fund at the time and in the manner it thinks best.**

**4. The approximate present value of this gift is: \_\_\_\_\_ .**

**5. ( ) I/We would like to be listed as a member of the Legacy Circle of the Old Presbyterian Meeting House, and would like for our names to be listed in the following manner:**

\_\_\_\_\_ .

**( ) I/We would prefer to remain anonymous at the present time.**

**6. I understand that the funds from this gift will be administered by the Trustees and Session of the OPMH pursuant to such investment and disbursement policies governing such gifts as have been promulgated and updated from time to time. I also understand that, should a time come when the Session determines that an extraordinary need for funds exists, the Session will be permitted, if at least 2/3 of the Session approves, to use these funds as necessary to address that extraordinary need regardless of the designations made above.**

**7. We would like for the Legacy Funds Annual Reports to be sent to: \_\_\_\_\_ .**

**By signing this memorandum of understanding, I reaffirm my commitment to the Old Presbyterian Meeting House, and recognize the Meeting House as a fitting and capable steward of my legacy.**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

**On behalf of the Old Presbyterian Meeting House, I acknowledge and accept this gift to be utilized in the manner described above.**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**