

Planned gifts by will

The first thing you need to know about a will ... is that you **definitely** should have one! Young, old, married, single, children, home, apartment, pets, money or not much -- you still need a will. And, speaking of wills, please give some thought to leaving a Living Legacy gift to the Old Presbyterian Meeting House – it's remarkably easy to do! If you would like more information about using your will to leave a Legacy Gift or the kinds of bequests you could leave to the Meeting House, please check the box in the attached form.

If you need a will or assistance with estate or financial planning, but don't have one because you don't have a lawyer or financial advisor, we can make that easy for you. We have a list of lawyers and financial advisors whom other members of the Meeting House have used and with whom they were pleased.

If you have questions about how to set up a relationship with a lawyer or financial advisor, a lawyer member of the Planned Giving Committee would be pleased to answer your questions. Please check the second box in the form.

If you have a will, but want to amend it to leave a gift to the Meeting House, and want some help in figuring out the next steps, the Planned Giving Committee would be glad to help. Again, just check the second box in the form.

If you would prefer to receive assistance from someone who is not a member of the Meeting House congregation, we can arrange for a planned giving representative of the Presbyterian Foundation to contact you. Please check the third box in the form.

If you have a will and have already included a gift to OPMH in it, the Meeting House would like to have that information for its confidential records – please let Rocky Laha know. And if, at a later point, you include OPMH in your will or estate planning, please give us this information.

Finally, if you have a lawyer or financial advisor who you have used for your will and would recommend to other OPMH members, please provide that information in the form.