

**Aldersgate United Methodist Church  
Permanent Endowment Program**

**Four-Step Endowment Checklist**

**The following information applies to the Aldersgate United Methodist Church (UMC) Permanent Endowment Program (PEP) and is provided to assist church members with the endowment process.**

**Step One**

Become familiar with the ministries that are available in the Aldersgate UMC PEP. Request a PEP Brochure and review the information. The Permanent Endowment Fund (PEF) Committee is available to answer any questions you may have--or find the answers--about the endowment program and assist you during the endowment process.

**Step Two**

Determine the amount (dollars or percent of estate) you want to contribute and the endowment fund where you want to direct your gift:

- \$\$\$ or % Permanent Endowment Fund (needs determined by Church Leadership)
- \$\$\$ or % Mission Endowment Fund (missions in and beyond local church)
- \$\$\$ or % Property Endowment Fund (care and maintenance of facilities)
- \$\$\$ or % Donor/Purpose Named Endowment Fund (for example: Youth, Music, Food Pantry, etc.). Minimum donation of \$25,000 required to establish a Donor/Purpose Named Endowment Fund. No minimum for the other funds.

**Step Three**

There are basically **two** ways you can donate to the PEP. You can make a **Direct Gift** of cash, investment securities, real or personal property or a **Legacy Gift** such as a bequest in a Will, designating the PEF as a beneficiary in a life/term insurance policy or annuity, etc. The attached **Donation Guidelines** are provided to assist you with information on each gift and suggested wording, if applicable.

**Step Four**

If you desire and the PEF Committee encourages you to do so, please provide the PEF Committee with information of a **Legacy Gift** so the church can appropriately thank you and have a record of your gift. We will respect your privacy and only acknowledge publicly your name(s) and donation with your signed authorization to release--but **never** the dollar amount. **Legacy Gift to Permanent Endowment Program Form** (bequests in a Will, beneficiary designation in a life/term insurance policy or annuity, etc.) is attached.

**Aldersgate United Methodist Church**  
**ATTN: Chairman, Permanent Endowment Fund Committee**  
**6610 Vaughn Road**  
**Montgomery, AL 36116**

**Legacy Gift to Permanent Endowment Program Form**

**Donor(s) Information:**

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

**Address** \_\_\_\_\_

**City** \_\_\_\_\_ **State** \_\_\_\_\_ **ZIP** \_\_\_\_\_

**Daytime Phone** \_\_\_\_\_

1. On \_\_\_\_\_ (MM/DD/YYYY), I/we made a **Legacy Gift** to Aldersgate UMC's Permanent Endowment Program. The following provides a brief description of the Legacy Gift. **For Example:** Bequest in a Will; \$\$\$ or XX % of estate to the Permanent Endowment Fund; \$\$\$\$ or XX% of estate to the Mission Endowment Fund:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Note:** The PEF Committee encourages you to attach a copy of the Legacy Gift instructions to your insurance company, wording in your Will or other Legacy Gift options for the church's record.

2. I/We understand that my/our name(s) and commitment of a Legacy Gift will only be released to the congregation with my/our signed authorization.

3. I/We reserve the right to modify or cancel the above Legacy Gift prior to its execution, but will notify the Permanent Endowment Fund Committee of this action.

**Signature of Donor(s):** \_\_\_\_\_ **Date:** \_\_\_\_\_

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