

**REPORT OF BEQUESTS AND MEMORIAL GIFTS
RECEIVED DURING CALENDAR YEAR 2007
(Return on Check Day)**

Name of Church _____ Church Number _____ District _____

Pastor _____ Church Address _____

The Annual Conference has requested the North Indiana United Methodist Foundation to gather data each year concerning the amount received in bequests and memorials by the local churches of the Conference. A report of totals will be made in the Annual Conference Report. All individual information will be held in strictest confidence.

BEQUESTS - For purposes of this report, a "bequest" is defined as an amount or amounts *actually received* from an estate or trust in 2007 by direction of the last will and testament or trust of a deceased individual naming the local church (or its endowment fund or foundation). An "estate" is defined as the total assets left by an individual at death from which the church receives a bequest of part or all of the total assets. A bequest is considered as *received* at the time the assets actually become the property of the church.

1. _____ Number of estates from which bequests were received in 2007.
2. \$_____ Total value of all bequests received in 2007 (if not cash, then list value of stock or other property valued as determined in estate). Enter 0 if none.
3. Funds/Assets received from bequests in 2007 were used as follows:
 - a. \$_____ Used for operating budget purposes
 - b. \$_____ Used for capital building or equipment purposes
 - c. \$_____ Used to establish or add to endowment funds
 - d. \$_____ Placed in Undesignated Reserve Fund
4. Total value of all assets received by "Bequest" in prior years and *still held* by trustees, Endowment Committee or Foundation at December 31, 2007 (regardless of year received) \$_____

MEMORIAL GIFTS - A "memorial" gift for purposes of this report is considered to be a gift received by the local church from a *living person* as a memorial to a deceased person.

5. \$_____ Total value of all memorial gifts received in 2007

WILLS AND MEMORIAL EMPHASIS PROGRAM ACTIVITY

- () Yes () No Our Church has an Endowment Fund and Committee.
() Yes () No Our Church has a Foundation.
() Yes () No Our Church has a Wills, Memorials and Estate Planning Committee.

Endowment/Foundation Chairperson _____ Phone _____

Address _____ Zip _____

Please send the following information:

Send to: (if other than chairperson above) _____

_____ Establishing an Endowment Fund or Foundation

_____ Promoting planned giving

_____ Advantages and opportunities of investing through the Conference Foundation

_____ Have the Conference Foundation contact us to discuss how they can help us with endowments, wills program or investments.

Contact Person (if other than above) _____ Phone _____

_____ Saving and investing through Loan Fund deposits

_____ Borrowing through the Loan Fund for capital improvements