

## St. Luke Trust Fund

### Legacy Directive

Thank you for choosing St. Luke Lutheran Church to receive a Memorial, Legacy Gift, Bequest or Insurance Proceeds from your estate. Please use this Directive form to document your wishes. You should also reference this Directive in your Will. The Trust Fund will handle your Legacy Gifts (Proceeds) according to the option you choose below. (Please select only one.)

\_\_\_ **The Endowment Fund**

Proceeds directed to the Endowment Fund will be locked, meaning the principal will never be spent but the interest gain each year will be available for church usage.

\_\_\_ **The Unrestricted Fund**

Proceeds directed to the Unrestricted Fund will be available immediately to address church needs in the following four categories: Property, Worship, Education and Outreach.

\_\_\_ **Temporarily Restricted**

If you wish to designate Proceeds for a specific purpose, choose this option. However, we request you meet with the Chair of the Trust Fund Committee or the Lead Pastor to discuss the limitations concerning this option.

Whichever option you choose, you may change it at any time by submitting a new directive.

Legacy Gifts left to the Church with no directive will automatically be added to the Unrestricted Fund per the Trust Fund By-Laws.

Once you have submitted this directive, we will email a copy to you for your records. We suggest you attach a copy to your Will and let your Executor know it exists.

Donor's Email address: \_\_\_\_\_

Confirmed Email address: \_\_\_\_\_

(Over)

Print Donor's Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Donor: \_\_\_\_\_

Signature of Trust Fund Chair or Lead Pastor: \_\_\_\_\_

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