



*Faith  
in Motion*

St. Margaret's Episcopal Church

ST. MARGARET'S EPISCOPAL CHURCH  
PALM DESERT

# Legacy Society Intention Form

**Please Print**

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Phone: \_\_\_\_\_

It is my/our desire to provide a legacy of financial support for St. Margaret's Episcopal Church, Palm Desert, a California nonprofit religious corporation. I/we am/are pleased to provide a testamentary gift that will benefit the ministry of St. Margaret's Episcopal Church.

Current estimated value of my/our planned gift \$ \_\_\_\_\_

**Please check one of the following to indicate the type of gift:**

- Revocable Trust                       Irrevocable Trust                       Individual Retirement Plan
- Life Insurance Policy                       Charitable Gift Annuity                       Our Private Foundation
- Will     Other \_\_\_\_\_

**Please note:** Gifts other than Cash, Marketable Securities, or Life Insurance are subject to approval and acceptance by the Church Vestry.

If you have already drawn your will, a simple codicil may be added to provide a gift, and at the same time it might be well to have your will reviewed and updated to reflect any recent changes in estate tax laws or your own family situation. When making or revising your will, always obtain the assistance of your personal financial advisor and/or a lawyer. A list of local estate planning attorneys is available on request from the office.

All planned giving donors qualify for inclusion and recognition as members of the Legacy Society of St. Margaret's Episcopal Church, Palm Desert. Inclusion allows St. Margaret's to express continued thanks for your intended gift, and it allows your planned gift intention to serve as encouragement to others.

**Please indicate your intentions as follows:**

- Yes, I/we have included St. Margaret's in my/our estate plan(s).
- Yes, please include me/us as member(s) of the Legacy Society of St. Margaret's.  
My/our names should be listed as: \_\_\_\_\_
- Yes, please include me/us as member(s) of the Legacy Society of St. Margaret's  
Episcopal Church, Palm Desert; however, do NOT publicly recognize me/us.
- No, please do NOT include me/us as members of the Legacy Society of St. Margaret's Episcopal  
Church, Palm Desert.

Signature(s) \_\_\_\_\_ Date \_\_\_\_\_

E-mail: \_\_\_\_\_

**St. Margaret's Episcopal Church, Palm Desert, California**  
EIN 95-2284938

If you have any questions, please contact the Controller or the Rector of St. Margaret's Episcopal Church  
47-535 Hwy 74, Palm Desert, CA, 92260 • (760) 346-2697