



Christ Episcopal Church Planned Giving Information Form

Today's Date _____

Please check all statements that apply

- I/We have included Christ Episcopal Church in Needham, MA in my/our estate plans.
- I/We would like more information on including Christ Episcopal Church in my/our estate plans.

Name _____

Address _____

City _____ State _____ ZIP _____

Phone _____ Email _____

I/we prefer to be contacted by Phone Email Mail Personal Visit

- I/We would like to be named on the Planned Giving Society Plaque

Please name as _____

- I/we prefer to remain anonymous

Optional Information

We would be very grateful for the following information about your estate provisions. Though this information is not required for membership in the Planned Giving Society, it will be of much value to Christ Church for long term planning purposes.

- Bequest Type and/or amount _____

Deferred Gift

- Annuity Charitable Remainder Trust Pooled Income Fund

- Retained Life Estate Amount _____

- Other Comments _____

Please contact a member of the Planned Giving Committee for additional information

| | | |
|---------------------|---------------------|--|
| Alan West, Chairman | 781-444-8739 | wawest@comcast.net |
| Greg Daoust | 781-444-3154 | |
| Joe Leghorn | 781-449-5214 | jleghorn@earthlink.net |
| Charley Ferrone | 508-481-0608 | cferrone@pensionwealth.com |
| Duff Lingard | 781-237-606 | william.lingard@citizensbank.com |
| Peter Tower | 781-237-1597 | petertower@verizon.net |

