

Sample Letter of Instruction

Date

Wisconsin United Methodist Foundation
750 Windsor Street, Suite 305
Sun Prairie WI 53590-0620

To Whom It May Concern:

In accordance with the Wills we have prepared, we have designated that upon the death of the second of us, _____ % of my/our estate will be given to charity. The Wisconsin United Methodist Foundation, Inc. has been designated to receive this bequest. I/We request the Foundation to distribute this bequest as follows:

25% (Twenty-five Percent) to XYZ United Methodist Church in XYZ, Wisconsin, to be used for new ministry needs as determined by the church council.

25% (Twenty-five Percent) to the Ministers Insurance Memorial Fund (C044) established at the Wisconsin United Methodist Foundation to provide assistance for retired clergy health insurance premiums.

50% (Fifty Percent) to establish the XYZ United Methodist Church General Endowment Fund at the Wisconsin United Methodist Foundation for the purpose of providing for the mission and ministry of XYZ UMC, XYZ, Wisconsin. The use of the earnings and growth from this fund shall be determined annually by the church council of XYZ UMC in XYZ, Wisconsin.

In the event any above specifically named qualified charitable funds or causes cease to exist I/we direct the Wisconsin United Methodist Foundation to determine appropriate programs or causes which most closely match my/our initial selections for distributions from this bequest.

Sincerely,

Date

Accepted by:

Date

Rev. William F. Helwig, President
Wisconsin United Methodist Foundation, Inc.
