

UNITARIAN UNIVERSALIST CONGREGATION OF PHOENIX CHALICE KEEPERS

Confidential Letter of Intent

Name (please print): \_\_\_\_\_

Name (please print): \_\_\_\_\_

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

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

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

I/We would like to discuss membership in Chalice Keepers.  
Please call me/us at \_\_\_\_\_ to arrange a time.

I/We are pleased to become members of Chalice Keepers. I/We qualify for membership by having arranged a future gift to UUCP through:

- A will or trust
- A charitable remainder trust, pooled income fund, or lead trust
- A gift annuity
- Making UUCP the beneficiary of an IRA, 401K, Roth, life insurance policy or annuity
- Titling an individual or joint investment asset by adding "transfer on death to the Unitarian Universalist Congregation of Phoenix"
- Other estate plan provisions for UUCP as noted here:

\_\_\_\_\_  
\_\_\_\_\_

Yes, I/we would be glad to be listed with other members of Chalice Keepers. My/our names should appear as follows:

\_\_\_\_\_

I/we do not wish to be listed in any Congregation publications.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

All gifts are subject to review at the time of transfer.

Mail to: UUCP, Chalice Keepers, 4027 E. Lincoln Drive, Paradise Valley, AZ 85253