

To Whom It May Concern:

If you have already or are considering including Vista's Permanent Endowment Fund (PEF) in you estate plans, please fill out the included form. For those who have already included the PEF in their plans, the information will allow us to update our records.

While all the information is important, several items deserve mention. The successor trustee of your estate plan or the executor of your will is the one responsible for implementing your wishes as defined in your plan. Equally important is the beneficiary which must be specified as the Permanent Endowment Fund of the Vista de la Montaña UMC and include the address of the church.

We thank you for including Vista's PEF in your legacy planning. This information will permit us to periodically follow up with you to see if any changes have been made in your plans.

Sincerely,

Chair of Endowment

cc: Vista Pastor

Date: _____

Estate Plan Information

Grantor Information

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Trust Name: _____

Date of the Trust: _____

Law Firm Information

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____

Name of Lawyer: _____

Trustee Information

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Successor Trustee/Executor Information

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____

Beneficiary Information: The information below should be included in the beneficiary section of your Will or Estate Plan.

Permanent Endowment Fund of the Vista de la Montaña UMC
3001 E. Mira Vista Lane
Tucson, AZ 85739

After completing the form, please mail it to:

Vista de la Montaña UMC
Permanent Endowment Fund
3001 E. Mira Vista Lane
Tucson, AZ 85739