

**Cokesbury United Methodist Church  
Establishing a Named Endowment Fund**

Name of Fund: \_\_\_\_\_

Purpose of the fund: \_\_\_\_\_

Initial investment: Amount: \$ \_\_\_\_\_ Date: \_\_\_\_\_

Cash: \_\_\_\_\_ Securities: \_\_\_\_\_ Property: \_\_\_\_\_

Timetable for distribution form endowment:      Annually \_\_\_\_\_  
   Semi Annually \_\_\_\_\_  
   Quarterly \_\_\_\_\_

Distribution Policy: Income only: \_\_\_\_\_  
   % of income: \_\_\_\_\_  
   % of annual fair market value: \_\_\_\_\_  
   Re-invest all income and dividends: \_\_\_\_\_

Donor(s): \_\_\_\_\_

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

Telephone: \_\_\_\_\_

Closest relative to donor: \_\_\_\_\_ Relationship: \_\_\_\_\_

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

Telephone: \_\_\_\_\_

Income Beneficiary: \_\_\_\_\_

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

Telephone: \_\_\_\_\_

Birth date: \_\_\_\_\_

Remainder Beneficiary (if different from above): \_\_\_\_\_

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

Telephone: \_\_\_\_\_

Birth date: \_\_\_\_\_

Provisions for additions to the fund: Yes \_\_\_\_\_ No: \_\_\_\_\_ When: \_\_\_\_\_

Investment: \_\_\_\_\_

Person most responsible for securing this endowment: \_\_\_\_\_

Permission to announce this endowment: Yes: \_\_\_\_\_ No: \_\_\_\_\_

Other information: \_\_\_\_\_

\_\_\_\_\_