

**(CONFIDENTIAL)**

## Endowment Development Program Survey For \_\_\_\_\_ United Methodist Church

Name(s) \_\_\_\_\_ Date \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ (City) \_\_\_\_\_ (State) \_\_\_\_\_ (Zip) \_\_\_\_\_  
E-mail \_\_\_\_\_

1. How long have you been a member of \_\_\_\_\_ United Methodist Church? \_\_\_\_\_

2. What do you value most at \_\_\_\_\_ United Methodist Church? \_\_\_\_\_

**Please rate. . . . 4 = most value to 1 = least value:**

\_\_\_\_\_ worship; \_\_\_\_\_ religious education; \_\_\_\_\_ fellowship; \_\_\_\_\_ music;  
\_\_\_\_\_ outreach; \_\_\_\_\_ pastoral care; \_\_\_\_\_ other (describe); \_\_\_\_\_

3. What is your family status? \_\_\_\_\_ single; \_\_\_\_\_ married; \_\_\_\_\_ widowed;  
\_\_\_\_\_ divorced; \_\_\_\_\_ other; \_\_\_\_\_

4. Do you have children? \_\_\_ How many? \_\_\_ Grandchildren? \_\_\_ How Many? \_\_\_\_\_

5. Have you attended a Planned Giving seminar? \_\_\_\_\_ If Yes, Where? \_\_\_\_\_

6. Have you ever attended a Wills seminar? \_\_\_\_\_ If Yes, Where? \_\_\_\_\_

7. Would you be interested in attending a Planned Giving or Wills seminar at \_\_\_\_\_  
United Methodist Church, assuming one was offered? \_\_\_\_\_

8. What would be a convenient time for you to attend?  
\_\_\_\_\_ weekday lunch; \_\_\_\_\_ Saturday morning; \_\_\_\_\_ evening \_\_\_\_\_; other \_\_\_\_\_

10. What is your age group? 30-40; \_\_\_ 40-50; \_\_\_ 50-60; \_\_\_ 60-70; \_\_\_ 70-80; \_\_\_ 80+

11. Which of the following uses for an Endowment Fund most appeals to you:

\_\_\_\_\_ Unrestricted (General) \_\_\_\_\_ Property/Building \_\_\_\_\_ Program \_\_\_\_\_  
\_\_\_\_\_ Outreach/Mission \_\_\_\_\_ Other (specify): \_\_\_\_\_

12. Would you be willing to support an Endowment Fund designed for the long-term  
benefit of \_\_\_\_\_ United Methodist Church? \_\_\_\_\_

14. Do you have a Will? \_\_\_\_\_ Does your spouse? \_\_\_\_\_
15. Do you have a Living Trust? \_\_\_\_\_ Does your spouse? \_\_\_\_\_
16. If you have a Will/Living Trust, how recently has it been revised or amended?  
 \_\_\_\_\_ in last year; \_\_\_\_\_ in last 3 yrs; \_\_\_\_\_ in last 5 yrs; \_\_\_\_\_ in last 10 yrs.
16. Do your children and loved ones know your basic estate plans? \_\_\_\_\_
17. Have you included \_\_\_\_\_ UMC in your Will/Living Trust? \_\_\_\_\_
18. Have you recently reviewed your total estate plan? \_\_\_\_\_
20. In your current financial situation, what concerns/interests you most?  
 \_\_\_\_\_ security of retirement income; \_\_\_\_\_ need for increased income;  
 \_\_\_\_\_ health care costs; \_\_\_\_\_ building estate assets; \_\_\_\_\_ providing for spouse  
 at death; \_\_\_\_\_ gifts for children/grandchildren; \_\_\_\_\_ bypassing probate; \_\_\_\_\_  
 reducing income taxes; \_\_\_\_\_ reducing estate taxes; \_\_\_\_\_ capital gain tax savings;  
 \_\_\_\_\_ leaving a lasting legacy; other \_\_\_\_\_
21. Do you have professional advisors?  
 \_\_\_\_\_ Attorney; \_\_\_\_\_ Financial Planner; \_\_\_\_\_ Life Insurance;  
 \_\_\_\_\_ Accountant; \_\_\_\_\_ Other: (Specify): \_\_\_\_\_
22. Are you familiar with these planned gift techniques and the benefits they provide?  
 \_\_\_\_\_ Charitable Gift Annuities; \_\_\_\_\_ Pooled Income Funds;  
 \_\_\_\_\_ Charitable Trusts; \_\_\_\_\_ Donor-Advised Funds; \_\_\_\_\_ Retained  
 Life Estates; \_\_\_\_\_ Charitable Life Insurance; \_\_\_\_\_ Retirement Plan Gifts.
23. Have you made any of the above types of planned gifts? \_\_\_\_\_
24. If yes, are there provisions for \_\_\_\_\_ United Methodist Church? \_\_\_\_\_
25. Do you have any additional questions or comments to share?

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

**Thank You For Participating!**

Please return completed Endowment Survey to:  
 Name of Committee/Task Force Chairperson  
 \_\_\_\_\_ United Methodist Church  
 Your Church Address, Phone and Fax