

**Planning for your future and the future of Wellspring**

**A congregational survey of financial and estate planning needs to create a legacy for Wellspring's ministries for years to come**

Do you have a will? \_\_\_ Yes; \_\_\_ No.      A trust? \_\_\_ Yes; \_\_\_ No.

If yes, is your will or trust over five years old? \_\_\_ Yes; \_\_\_ No.

Have you included a bequest to Wellspring's Permanent Endowment Fund? \_\_\_ Yes; \_\_\_ No.

Your age: \_\_\_ 18-40; \_\_\_ 41-65; \_\_\_ over 65

Are you: \_\_\_ single; \_\_\_ married; \_\_\_ widowed?

Please add any comments below:

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Are you interested in participating in a Financial Planning workshop and/or a Gift and Estate Planning workshop? \_\_\_ Yes; \_\_\_ No.

If you would like someone from the Permanent Endowment Committee to contact you, please provide contact information:

Name: \_\_\_\_\_

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

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Please place this survey in the offering plate or drop it by the church office. Your response will help the Permanent Endowment Committee plan financial planning and estate planning workshops. THANK YOU!