



Legacy Church Information Needed

(With Appreciation to Living Water Association, Ohio NorthEast UCC)

Essential Information – Start here!

1. Governance documents – Constitution and bylaws. Needed to guide decision making process.
2. Up to date membership records, including contact information and noting which members have voting rights. Needed for communication and to determine who may vote on essential matters.
3. If the church is a charitable or non-profit corporation, the incorporation document (e.g., Certificate of Incorporation or Articles of Organization) and copies of filings (available from Secretary of State). Needed to determine legal path forward.
4. Real estate records, starting with property deeds. Needed to establish clear title and other preparation for sale or transfer of property. Typically available at local registry of deeds.
5. Real estate valuation appraisal produced by a professional with commercial or institutional experience (not a marketing assessment by a realtor) is essential. An appraisal report can usually be obtained within a few weeks of hiring an appraiser, and often includes building condition review, zoning and other information. It will inform many decisions regarding legacy building and the timetable for moving ahead
6. Recent statements for all checking, savings, and investment accounts. Needed for planning distribution of assets.
7. Financial and documents (such as a will or donation letter) evidencing endowment, memorial or other gifts to the church. Needed to determine whether the gift was “donor-restricted” for legal purposes. Note that endowment account use restrictions which were designated by the church, rather than a donor, are not “donor-restricted”. These records are needed to assure proper recognition and disposition of assets.

Additional Information – Eventually needed

8. Names, addresses, telephone, and email addresses for all officers and governing council members. Needed for communication and creation of legal documents
9. If the church owns a cemetery, requirements for care and upkeep. Needed to make arrangements for the future.
10. Copies of insurance policies and agent information. Needed to determine ongoing cost and other obligations. It is important to disclose to property insurers if any property will no longer be in regular use.
11. Real property inventory, including furniture and equipment. Needed for determining disposition of assets.
12. Inventory of financial liabilities, including any bank debts, credit card debt, equipment, auto or other leases, and any amounts owed to pastor and any other employees. This includes copies of any agreements and credit card statements. Any unwritten or oral agreements should be documented in writing. Needed for planning distribution of assets.
13. Service agreements with any vendors, such as telephone, internet service, photocopier services, cleaning services, etc. Needed to review termination provisions. It may be helpful to list occasional service providers such as HVAC, plumbing, electrical, sound system, piano tuners, fire extinguisher maintenance, security system, etc.
14. Written agreements with tenants, lessees and other outside users of the property, also oral or unwritten agreements which should be documented in writing. Needed to prepare for sale or transfer of property.