

# Legacy

Summer 2006



UNITARIAN  
UNIVERSALIST  
ASSOCIATION OF  
CONGREGATIONS

## Umbrella Giving: A Success for Congregations!

By the UUA Stewardship & Development staff

**T**he UUA Legacy Gifts Office staff has helped congregations, districts and UUA affiliates raise more than \$1.8 million in planned and deferred gifts during the 2006 fiscal year. Of this amount, \$1.4 million was raised through new gift annuities.

Charitable gift annuities are a wonderfully simple way for committed Unitarian Universalists to support our liberal religious faith. Individuals can make a gift to support Unitarian Universalism and receive a tax deduction and additional income during the rest of their lives. Unitarian Universalist congregations and districts have begun promoting gift annuities as part of their overall fundraising and stewardship plans. For congregations, however, there could be a catch. As simple and wonderful as gift annuities are for the individuals and couples that create them, operating a gift annuity program is fraught with administrative and accounting headaches that make it too difficult

for any one congregation or district to do alone. Fortunately, the UUA operates a very successful gift annuity program—The Umbrella Giving program—which congregations and districts can use for their benefit without cost, risks, or complications.

Congregations in the Pacific Northwest district have had the greatest success, raising more than \$700,000 in gift annuities during 2006. According to Janine Larsen, the District Executive, the Pacific Northwest District congregations have had a long tradition of generosity. Janine notes that she's not surprised by the success of charitable gift annuities, since Seattle is home to the nation's recognized expert on charitable gift annuities, and his influence is felt directly or indirectly by every charitable organization in that region.

Many congregations in the Pacific Northwest stand out as particularly generous, among them East Shore Unitarian Church in Bellevue, WA. East Shore is committed to making

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PHOTO BY RON HAMMOND

*Bill Lauman, endowment  
volunteer and donor*

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charitable gift annuities and other planned giving a vital part of its fundraising activity through its *Elliot Marple Bequest Society*, named in honor of a founding member and past president of East Shore church who also was a co-creator of its endowment fund.

Bill Lauman of the East Shore congregation has been active in working with the members of his congregation to obtain new gift annuities. Moreover, Bill, along with his wife, Kerri, is a gift annuity donor. From his vantage point as an endowment volunteer and as a donor, Bill credits the UUA for having just the right information needed to educate his endowment committee about gift annuities and then be available to support its

efforts when someone from the congregation was interested in establishing a gift annuity.

Consider using the UUA staff to help *your* congregation. The Legacy Gifts Office assists in the giving process in many ways. We will prepare information packets for those interested in gift annuities and provide information on how the gift annuities work and their potential benefits. Once an individual decides to establish an annuity, we will process the new gift and prepare the necessary tax receipt letters. Thereafter, we will administer the gift by ensuring that the funds are invested wisely, by processing annuity payments and by preparing annual tax reports. Upon the death of the donor we will distribute the residual funds to

the congregation and, through our Umbrella Giving Program, to any other UU institution as directed.

Charitable gift annuities provide great potential benefits for all. Contact the Legacy Gifts Office for more information: [giftplans@uua.org](mailto:giftplans@uua.org) or (888) 792-5885.



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