

# Legacy

Winter 2006



## Consider Establishing A Legacy Gift Through The UUA to Continue *Your* Life's Work

Just as there are many paths in the Unitarian Universalist search for truth and meaning, there are many paths to generosity and many ways to strengthen hope and reason. You might choose to use your financial resources in partnership with others to bend the world closer to the principles of freedom, tolerance, justice, love, and respect. We want to be effective trustees and stewards of our great liberal religious heritage. We want future generations to inherit and enjoy this free faith, and we know financial support is vital to this hope. Still, each of us must find our own way to make it a reality, balancing our own financial needs with our desire to give.

You need not search alone. The UUA has the resources to help you support the future of Unitarian Universalism. For instance, we can show you how to make a gift today and receive payments for the rest of your life. We can explain how to make a gift of appreciated securities, real estate, or an individual retirement account (IRA). We can help you craft your estate plans to provide a significant, lasting contribution to our common work as Unitarian Universalists.

The UUA Legacy Gifts Office can help you find the best way to leverage your assets to continue your work in the world and in our faith community.



UNITARIAN  
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### New IRA provisions

If you are 70½ or older, in 2006 and 2007 you have an opportunity to make a direct transfer—free of taxes—from your IRA to an eligible charitable organization. We would be happy to provide more details about this opportunity.

# They Are Still with Us

All of us have been touched in some way by the lives of Unitarian Universalists who have preceded us. Some have touched us directly and some indirectly. Some we have met. Some we have not, but we know their names through the generosity of the individuals, their families, or others who have set up endowments to honor and continue their work. There are many UUA endowments that continue the work of their namesakes, including funds for the training of UU ministers, for lay leadership development, for public witness on issues of social justice, to promote excellence in sermon writing, and for many other purposes. The endowment goals are as varied as the passions and contributions of the people after whom they are named.

## What is an endowment?

An endowment is a gift that lasts

forever. Once the endowment is funded, the principal is invested and only a small portion is spent—thus ensuring that the principal remains intact or increases. Gifts of cash, appreciated securities, real estate or other assets allow you to receive an immediate tax deduction. You may add to the endowment at any time during life or at death through a bequest in your will or living trust. Some endowments encourage others to make donations to the endowment fund. Like most organizations, the UUA requires a minimum amount to establish a named endowment.

If you have questions regarding endowments, or if you are contemplating a gift to the Unitarian Universalist Association, a UU congregation, or a UU affiliate, please contact the UUA Office of Legacy Gifts.



## UNITARIAN UNIVERSALIST ASSOCIATION OF CONGREGATIONS

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