



UNITARIAN UNIVERSALIST  
ASSOCIATION OF CONGREGATIONS

## PLANNED GIVING RESOURCES ORDER FORM

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

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

Name of Congregation: \_\_\_\_\_

Phone / Email: \_\_\_\_\_

NOTE: Due to the high costs of shipping—the printed information flyers are no longer available in quantities greater than 1. We ask that you print or make copies of these resources in the quantities needed.

### Printed Information Flyers (MAX 1 of each)

	Flyer Title
	Pathway to a Legacy Booklet
	Charitable Bequests: Use Your Will to Give To Unitarian Universalism
	The UUA Charitable Gift Annuity: A Legacy of Hope
	The Pooled Income Fund: Fund a Legacy
	Charitable Remainder Trusts
	Umbrella Giving
	2008 Charitable IRA Rollover Opportunity
	Congregational Resources:
	Planned Giving : A Guide for Unitarian Universalist Congregations (22 pages)

### In-Depth Booklets (limited quantities)

Qty.	Booklet Title
	Pathway to a Legacy Booklet
	Charted Giving Plans
	37 Things People “Know” About Wills That Aren’t Really So
	Giving Through Charitable Remainder Trusts
	Giving Through Charitable Lead Trusts
	Better Estate Planning
	How to Make a Will That Works
	Giving Through Retirement Plans
	Giving Through Life Insurance
	Giving Real Estate

<b>Sampler Kit</b> <i>One copy of each resource</i>
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Please send or fax your order to:

**Unitarian Universalist Association**  
**Office of Legacy Gifts**  
**25 Beacon Street**  
**Boston, MA 02108-2800**

tel (888) 792-5885 | fax (617) 725-4979  
giftplans@uaa.org

Please allow 10 working days for delivery.

**Thank you for your order!**

= PDF version available at  
[www.uua.org/giftplanning](http://www.uua.org/giftplanning)

These resources are available to Unitarian Universalist Congregations at no cost.

# FREE




## PLANNED GIVING RESOURCES

### Interested in promoting Planned Giving within your congregation?

The Association's Office of Legacy gifts has free resources for your congregation's program. These resources are available online and in print. Send or fax in your order or visit [www.uua.org/giving/](http://www.uua.org/giving/) for more details.

### Popular Resources

*available online*

-  **Pathway to a Legacy Booklet:** Contains information on 10 different planned gift arrangements - a great introduction to gift planning.
-  **Ways of Giving Handouts:** In-depth information about the following planned gift arrangements.
  - Charitable Bequests: Use Your Will to Give To Unitarian Universalism
  - The UUA Charitable Gift Annuity: A Legacy of Hope
  - The Pooled Income Fund: Fund a Legacy
  - Charitable Remainder Trusts
  - 2008-09 Charitable IRA Rollover Opportunity
-  **Umbrella Giving: Many Gifts, One Creative Solution!**: Information on Umbrella Giving and how it works.


### Specific In-depth Booklets

*only available in print and in limited quantities*

- **Charted Giving Plans:** Look at the advantages of popular giving plans in a helpful chart format. Twelve categories of information about seven giving options are offered for comparison in a 28-inch-long table. The reverse side briefly explains the gift plans and their tax consequences.
- **37 Things People "Know" About Wills That Aren't Really So:** Fact replaces fiction in this interesting look at 37 commonly held myths about wills.
- **Giving Through Life Income Plans:** Review the process of deferred gift planning with emphasis on gift plans that provide an income for life or a term of years. Examples show approaches to solving typical estate planning dilemmas. An all-purpose booklet with many uses.
- **Giving Through Charitable Remainder Trusts:** This booklet describes the benefits of charitable remainder unitrusts and annuity trusts in a clear and understandable manner. The emphasis is on what these trusts can accomplish for your donors, not on simply how they do it. Includes citations to guide advisors in the creation of charitable remainder trusts.
- **Giving Through Charitable Lead Trusts:** With today's relatively low interest rates, lead trusts yield especially attractive tax benefits for many donors. Acquaint prospects and their advisors with this versatile but perhaps unfamiliar planning tool, attractive for generating a major charitable gift while having property ultimately returned to the donor or his or her heirs.
- **Better Estate Planning:** This booklet begins with "What is estate planning?" and goes on to introduce popular planning tools and to describe ways charitable giving can complement retirement and estate plans.
- **How to Make a Will That Works:** This popular booklet features answers to 36 questions that stress the importance of a will. Charitable bequests are introduced at appropriate points in a low-key manner. An ideal follow-up booklet for a bequest awareness program or for other general purposes.
- **Giving Through Retirement Plans:** The benefits of using retirement plan assets for charitable bequests and instructions on how to do it.
- **Giving Through Life Insurance:** A review of ways to use life insurance to make charitable gifts, both current and deferred. Assignments of benefits, outright gifts, and the uses of insurance to fund or guarantee pledges are discussed, along with ways life insurance may replace other assets used to make charitable gifts.
- **Giving Real Estate:** A companion piece to "Giving Securities," this booklet emphasizes the many gift opportunities open to those who own highly appreciated real property. Donors in areas with rapidly increasing real estate values or who hold the majority of their wealth in real property will benefit from "Giving Real Estate."

### Congregational Guides

*available online*

-  **Planned Giving: A Guide for UU Congregations:** A 22 page resource guide to help you plan and conduct your planned giving program in your congregation.