

Congregational Planned Giving Resource Sheets

How to Remember Us in Your Will

Creating a bequest is easy and as simple as adding a sentence or two to your will. Regardless of the amount, your bequest is a statement of faith, and if you demonstrate that you care enough about Unitarian Universalism to support its future, others will follow your example. Below is suggested language you can use to draft your bequest.

UNRESTRICTED GIFT

I give to the Unitarian Universalist Association (UUA) (tax I.D. number 04-2103733), a nonprofit 501(c)(3) corporation, located in Boston, Mass., [_____ percent of my estate or the sum of \$_____] for its general purposes.

RESTRICTED GIFT

I give to the Unitarian Universalist Association (UUA) (tax I.D. number 04-2103733), a nonprofit 501(c)(3) corporation, located in Boston, Mass., [_____ percent of my estate or the sum of \$_____] to be used for [stated purpose]. If at any time in the judgment of the UUA board of trustees it is deemed impossible or impracticable to carry out the above purpose, said trustees shall determine a purpose as near as possible to that description above.

You should consult your professional advisor to be sure you have a properly drafted legal document.

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This copy is provided to you by the UUA Office of Legacy Gifts. Please feel free to use and modify it in your own publications to engage and educate members and friends about planned giving in your congregation.

Additional planned giving resources can be found at: www.uua.org/giving/plannedgifts/



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