



## The UUA's UMBRELLA GIVING PROGRAM

### The Simple Way to Give to Unitarian Universalism!

As an association of congregations, the UUA can and should put its combined strengths to work for the benefit all Unitarian Universalist organizations. That is why, as part of our mission to serve our member congregations and the wider movement, the UUA has developed a simple and creative solution that we call “**umbrella giving.**”

#### **What is umbrella giving?**

Umbrella giving allows entities under the UU umbrella to receive gifts through a single donation to the Association.

#### **How does this work?**

The process is simple. You make a single gift to the Unitarian Universalist Association and let us know how you would like your gift to be distributed. The UUA then in turn distributes the gift and notifies the benefiting entity according to your instructions.

#### **Why would I want to use the UUA's Umbrella Giving Program?**

The Umbrella Giving Program:

1. Creates a way for you to give anonymously.
2. Gives you access to life income gift options such as charitable gift annuities and charitable trusts.
3. Allows your congregation to focus its resources on programming instead of gift administration.
4. Provides you access to and support from knowledgeable and professional staff.
5. Creates accountability for gifts with restrictions.
6. Simplifies your estate plans.
7. Leaves a lasting legacy ...

#### **What types of gifts are eligible?**

Any gift given to the UUA can be an umbrella gift. This includes outright cash and gifts of stocks and mutual funds as well as planned gifts such as bequests and gift annuities.

#### **What does this cost?**

Nothing. Umbrella giving doesn't cost you or the final beneficiaries a dime. This is a **completely free** service supported by your contributions. We encourage individuals who make an umbrella gift to designate at least 25 percent of their gift to the UUA, to help us continue our work on behalf of all our congregations, but the final distribution of the gift is entirely up to you.

### Can I give an umbrella gift to non-UU entities?

No. The Umbrella Giving Program was established to serve the larger UU community. Umbrella gift beneficiaries must be UU Congregations, districts, theological schools, and other UU entities.

### How do I designate an umbrella gift in my will?

First, you need to consult with your professional advisor to add the following suggested language to your will:

I give to the Unitarian Universalist Association (UUA) (tax I.D. number 04-2103733), a non-profit 501(c)(3) corporation, located in Boston, Massachusetts, [ \_\_\_% of my estate or the sum of \$\_\_\_\_\_ or specific asset] to be divided by the UUA consistent with any memorandum or statement of intent I may deliver to the UUA prior to my death.

Second, you send a signed letter to the UUA that describes how you want your gift to be divided. This is your *letter of intent*. We will contact you when we receive it. If at any point you want to update the beneficiaries, instead of having to update your will again, you simply send the UUA an updated *letter of intent*.

### Will the beneficiaries be notified?

This decision is yours to make. You can choose to have us keep this gift confidential, notify the beneficiary of your umbrella gift, or notify the beneficiary that an anonymous umbrella gift has been made.

### How quickly are funds distributed?

Once the UUA receives funds from a stock gift, estate, trust, or other vehicle we will process and distribute the funds according to your intentions within two business weeks.

### For more Information

Please feel free to contact the UUA's Office of Legacy Gifts at 888-359-7558 or [giftplans@uaa.org](mailto:giftplans@uaa.org) for more information. As with any substantial gift, we recommend that you consult your tax professionals.

Through the UUA's Umbrella Giving Program, individuals have supported organizations including, but not limited to:

All Member Congregations  
All 19 UU Districts  
Unitarian Universalist Association  
Church of the Larger Fellowship  
Meadville Lombard Theological School  
Starr King School for the Ministry  
UU Retired Ministers & Partners Association  
Camp de Benneville Pines  
Ferry Beach Park Association  
Rowe Camp and Conference Center  
Star Island Corporation  
The Mountain Retreat and Learning Center  
Unirondack Camp and Conference Center  
UU Service Committee  
UU United Nations Office  
UU Women's Federation

The Association's resources and trained professional staff are here to assist you in making one gift that will ultimately help multiple Unitarian Universalist entities. **Put the UUA to work to benefit the UU organizations you love!**

**UUA Office of Legacy Gifts**  
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*Revised June 2009 - by Istritof*