



## Use Your Will to Give to Unitarian Universalism

*If Unitarian Universalism is like family to you, include it in your will.*



*“This has been my church since I was twelve years old. I met Linda at the Emerson UU Church in Ellisville, Missouri. Unitarian Universalism is the only place where we are accepted as a family.”*

Barbara W. Brown, (right), explains why she and Linda A. McAffrey included the UUA in their estate

Whether you are writing your first will or updating an existing one, we hope you'll include a gift to the Unitarian Universalist Association, your congregation, or other UU organizations in your plans. In a world where hate and oppression make claim to religious truth, Unitarian Universalism offers love, democracy, and compassionate justice. A bequest will bring you joy and will strengthen and extend our faith.

### **You don't have to be a millionaire to make a difference in the world.**

Bequests are for everyone and anyone. They are both sensible and simple gifts. A charitable bequest allows you to be a Unitarian Universalist philanthropist *and* keep your financial options open.

You can use your will to give a specific dollar amount, a percentage of your estate, or a specific item, such as real estate, a boat, artwork, the family silver, copyright or royalty income, or savings bonds.

Whatever you wish to give, we want to make it easy. Sample bequest language is included in this brochure for you to share with your attorney. If none suits what you have in mind, please contact the UUA Office of Legacy Gifts. We are happy to help!

### **Bequests and other estate gifts come in all shapes and sizes and are as different as the people who create them.**

Some bequests are unrestricted, given for general purposes; the UUA or your congregation can put these gifts to use where they are most needed.

Some bequests are restricted, given for very specific purposes, such as the permanent endowment, building maintenance or a long-term project.

The UUA welcomes bequests directed to such areas as congregational growth, social justice, public witness, scholarship assistance for ministers and religious educators, continuing education funds, relief funds for ministers and families in need, lay leadership training, Beacon Press, Skinner House Books, the UU World magazine, and youth, campus, and young adult programs. We are happy to discuss options with you.

### **Anyone can make a meaningful gift to Unitarian Universalism in their will.**

Regardless of the amount, your bequest is a statement of faith. Faith that our Unitarian Universalist movement and its voice for compassionate justice and religious freedom are important now—and will be important long after we are gone.

And when you demonstrate that you care enough about Unitarian Universalism to support its future, others will follow your generous example.



*“Emerson said, ‘We are not born free, but with a mortgage.’ We need to recognize what we owe to the past. Unitarian Universalism has been a guiding influence in our lives and we are happy we can repay part of that debt. We want to secure this important resource for future generations.”*

Dr. Frank and Mrs. Alice Schulman,  
*The Woodlands, Texas*

## **Types of Restricted or Unrestricted Bequests**

### **General Bequest**

You give your entire estate to the UUA, your congregation, or other Unitarian Universalist organization.

### **Specific Bequest**

You give a specific amount, percentage of your estate, a specific asset, or collection of assets (cash, securities, or other property). Savings bonds, tax-deferred retirement accounts, and other items known as “income with respect to a decedent” (IRD) are extremely tax effective ways to support charitable organizations.

### **Residuary Bequest**

Your will can stipulate that charitable gifts be made using all or a percentage of what remains of your estate after all specific bequests have been satisfied and debts and expenses have been paid.

### **Contingent Bequest**

You give all or a portion of your estate to the UUA in the event that other named beneficiaries predecease you or disclaim your bequest. This type of bequest can avoid costly litigation or prevent property from reverting to the state for lack of heirs.

### **Testamentary Charitable Remainder Trust**

A trust document is created during your lifetime, with a “pour-over” will to designate which assets are to be placed in a trust with the income paid to specific individuals for their lifetimes. Upon the death of the last income recipient, or after a term of a specified number of years, the trust terminates and assets are transferred to the UUA, or a congregation, completing your gift.

## **Another Estate Planning Option**

### **Beneficiary Designation**

You can name the Unitarian Universalist Association as a beneficiary of your existing account in a donor advised fund, a retirement plan, IRA account, or a life insurance policy.

## **Suggested Bequest Language**

Please share the following suggested bequest language with your attorney to assist in drafting a will or codicil or to designate the UUA as a beneficiary of your revocable will, life insurance policy, retirement plan, and the like. If the suggested language does not suit your needs, the UUA Legacy Office team can help you craft the language you need to achieve your charitable estate goals.

### **General Bequest**

I give all my real and personal property to the Unitarian Universalist Association of Congregations, a Massachusetts charitable corporation located at 25 Beacon Street in Boston, Massachusetts, for its general purposes.

### **Specific Bequest**

I give \_\_\_\_\_ [\$ amount, description of property, or % of estate] to the Unitarian Universalist Association of Congregations, a Massachusetts charitable corporation located at 25 Beacon Street in Boston, Massachusetts, for its general purposes.

### **Residuary Bequest**

I give all [or \_\_\_\_\_ %] of my remaining assets of any kind to the Unitarian Universalist Association of Congregations, a Massachusetts charitable corporation located at 25 Beacon Street in Boston, Massachusetts, for its general purposes.

### **Restricted Bequest for Specific Purpose**

I give \_\_\_\_\_ [\$ amount, description of property, or % of estate] to the Unitarian Universalist Association of Congregations, a Massachusetts charitable corporation located at 25 Beacon Street in Boston, Massachusetts, restricted to \_\_\_\_\_ [describe or name the program or fund]. 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 described above.

*The future of Unitarian Universalism is in your hands.*

*“Unitarian Universalism means the world to us.”*

*“I want my religious values to live on.”*

*“I want Unitarian Universalism to be available to others.”*

*“We want to help Unitarian Universalist churches grow and prosper.”*

*“The world needs Unitarian Universalism’s voice for compassion and justice.”*

*“It means a lot to me to give something back to our movement.”*

**Would you like more information?**

**The gift planning team at the Unitarian Universalist Association offers resources and information to Unitarian Universalists who want to help keep the chalice fires burning bright for future generations.**

**Please contact us.**

**Unitarian Universalist Association of Congregations**

**Office of Legacy Gifts**

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