



MEMORANDUM

TO: UUA Board of Trustees
FROM: Tim Brennan
RE: Endowment participation request
DATE: October 16, 2013

Under the Investment Policy of the Board of Trustees (Appendix 2B), “The UUCEF accepts investments from the following: . . . Other UU organizations approved by the Board of Trustees following application to the Treasurer.” The Treasurer then reviews the application and makes a recommendation to the Board.

We have received request from the UU Retired Ministers and Partners Association (UURMaPA) to set up an account in the UU Common Endowment Fund.

Under their by-laws, the purpose of the organization is as follows: “Acting in conformity with the purposes and principles of the Unitarian Universalist Association, the purposes of this organization shall be to serve the Unitarian Universalist movement, and to enhance the well-being of retired Unitarian Universalist ministers, their life partners and surviving life partners and to provide such programs and activities as may be feasible for their benefit.”

Therefore, I recommend that the UURMaPA be permitted to participate in the UU Common Endowment Fund.

Motion

To approve the participation of the UURMaPA in the UU Common Endowment Fund.