



Welcome!

Faith Development Office Webinar

Before we get started...

Please mute your microphone
and turn off your camera.

Find the Meeting Chat box
and introduce yourself.



“Housekeeping”

Audio problem? Mute audio on your computer. Call in by phone.

We’ll have time for questions at the end.

Recorded webinar, slides, and transcript will be posted online:

www.uua.org/re/teachers/webinars



Welcome!

Introduction to Stewardship and Development

March, 2016



Presenters

Host – Gail Forsyth-Vail
Adult Programs Director, Boston

Presenter – Cam Archibald
Stewardship and Events Assistant Director, Boston

Presenter – Laura Randall
Legacy Gifts Manager, Boston

Presenter – Vail Weller
Director of Congregational Giving, San Mateo, CA



“Take from Life Its Coals”

Laurel S. Sheridan



We begin with abundance





Role of Religious Educators

- Religious educators – **you** are the link to our families, children, and youth.
- The church's financial statement of mission is a sacred document, which demonstrates the value of lifespan faith development. You can help underscore this.
- Religious educators often feel the effect of budget changes most directly.
- What motivates you to be involved in this conversation?



Stewardship is a Spiritual Issue

- It's all a gift.
- It is a privilege to be able to help people link their resources with their most dearly held values.
- The issue is not just the amount one gives to the church. It is using all the resources at our command to craft lives of meaning and purpose.
- Stewardship is an all-year calling to a new way of life.



Stewardship is a Spiritual Issue





How Do We Nurture a Culture of Abundance?

1. A safe environment
2. A vision that matters
3. Sharing stories about this vision
4. Community
5. Gratitude



Nurturing a Culture of Abundance

- A Safe Environment -

Generous congregations provide a safe environment in which to talk about money, its role in our lives, and how to spend, save, and share it responsibly.





Nurturing a Culture of Abundance

- A Safe Environment -

- It is important to meet people where they are with the issue of money. We as leaders need to have done our own work so that we can be aware of where we are coming from.
- Offer opportunities for your congregation to do these reflections.
- UUA curriculum “The Wi\$dom Path”
- Resources that YOU recommend!
 - e.g., *The Table Where Rich People Sit*, Baylor



Nurturing a Culture of Abundance

- a Vision for Ministry that Matters -

- Our congregations offer an alternative to the consumer culture of American society.
- We have the opportunity to offer meaningful transformation for people who long for lives of more service, commitment, and generosity.



Nurturing a Culture of Abundance

- a Vision for Ministry that Matters -

- We need to be better about asking, expecting, and inspiring people to put their values in line with their resources.
- Abundant giving is about inspiration and lives being transformed through challenge to live a different, more values-centered life.



Nurturing a Culture of Abundance - Community -

Our tradition is at the heart of many lives.
It is worth our support and our sacrifice.





Nurturing a Culture of Abundance

- Gratitude -

Gratitude

Nurturing
Generosity

Giving as a
spiritual
practice



Nurturing a Culture of Abundance - Gratitude -

Generosity is a fundamental aspect of a healthy spiritual life. Our congregations can be important places for generosity to be encouraged and practiced.





UUA Funding Areas

Annual Program Fund and GIFT Congregational Giving





UUA Funding Areas - APF

- “a promise that has already been made”
– COVENANT
- Why We Give
- What We Get
- Resources and talking points
www.uua.org/giving/apf



UUA Funding Areas

Planned Giving

- Gifts by will
- Life income gifts
- Non-cash gifts

uua.org/giving/planned

PAYMENTS FOR LIFE WITH A CHARITABLE GIFT ANNUITY

A charitable gift annuity (CGA) is a way you can make a gift to our UUA that pays you fixed payments for the rest of your life. This promise is backed by all of our assets so your payments are secure!

Benefits include:

- Secure fixed payments for life
- Charitable deduction and tax savings
- Partially tax-free income
- Bypass all or a portion of the capital gains on appreciated assets

You might be surprised at how high your charitable gift annuity payment could be, based on a gift made to us of cash or assets this year.

CGA RATES	
AGE	RATE
65	4.7%
70	5.1%
75	5.8%
80	6.8%
85	7.8%
90	9.0%

Rates as of 4/13/2015

Contact us to find out how high your gift annuity rates can be.

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SMART IDEAS FOR YEAR-END BENEFITS

Tax-Wise Giving Strategies

With the end of the year just around the corner, now is an excellent time for you to review your plans. You might want to make a list to ensure that you have taken full advantage of all of the tax-saving deductions available to you. Here are some ideas for year-end planning that can help support Unitarian Universalism and benefit you.

CHARITABLE CONTRIBUTIONS

A simple gift of cash or an unneeded asset can assist our work and provide you with valuable tax savings.

CHARITABLE GIFT ANNUITY

Double your benefits while making a gift and receiving cash back. A gift annuity gives you income tax advantages this year while providing you with dependable payments for life at fixed rates as high as 9%.

IRA CHARITABLE ROLLOVER

If Congress again passes the IRA charitable rollover. You can transfer up to \$100,000 directly from your IRA to a qualified nonprofit without paying federal income tax. Check with us to see if this option is available this year.

ADDITIONAL TAX SAVINGS

Be sure to review your mortgage, medical, education, business and other miscellaneous expenses to determine if there are additional ways you can save on taxes this year. Check your list against your advisor's recommendations to avoid missing any significant deductions. Congress has changed the rules in recent years. If you haven't visited your attorney to review your estate plan, you should make an appointment before the end of the year or early in the new year. Your plans may need to be updated, particularly if you have experienced life changes. Please contact us for help.



UUA Funding Areas

Friends of the UUA – individual gifts by mail

- Faithful Sustainers

Mid-Level and Major Gifts

- Life's Calling Campaign
- President's Council





UUA Stewardship Work

Gift Processing

- Umbrella gifts

Stewardship Support and workshops

Wi\$dom Path

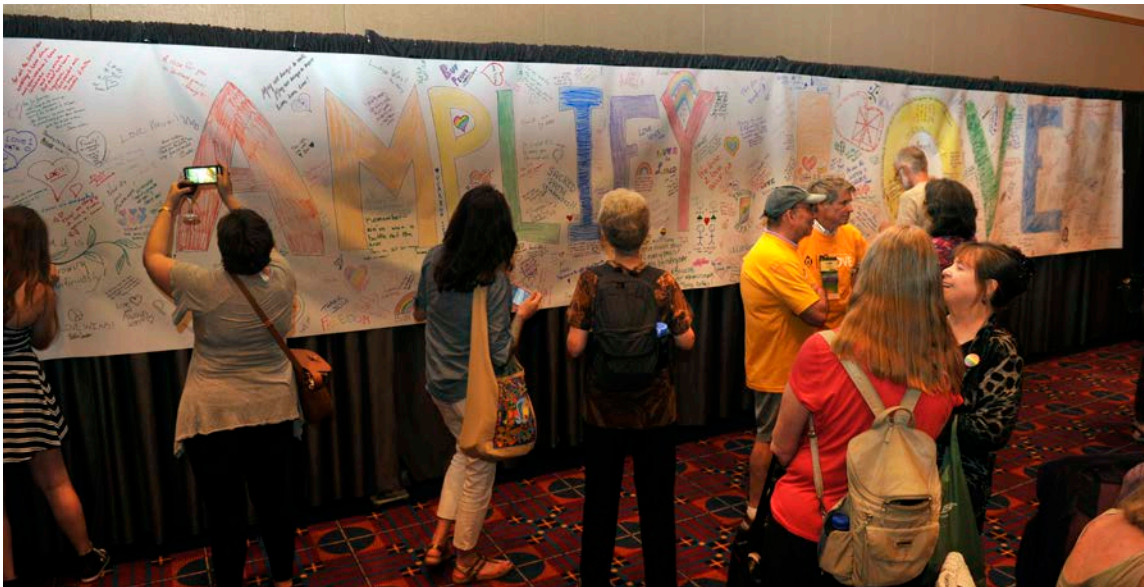
- Financial Literacy for Adults



UUA Stewardship Work

General Assembly

- APF Booth and Ribbons
- Special Events





Please add your questions
to the chat box.

This webinar has been recorded
and will be posted online at
www.uua.org/re/teachers/webinars



Closing Words

In this community we give and we receive.

May we go forth, now,
to share the bounty of our love.

-- Sydney K. Wilde

*1997 UUMA Worship Materials
Collection*





Your UUA is Here to Help

UUA Office of Stewardship & Development

(888) 792-5885

giftinfo@uua.org

uua.org/giving



UUA Office of Legacy Gifts

(888) 792-5885

giftplans@uua.org

uua.org/giving/planned



Upcoming Webinars

Radically Shared Ministry

Tues. April 19 at 1 pm Eastern
or, Wed. April 20 at 9 pm Eastern

Implementing Themes in RE

Tues. May 17 at 1 pm Eastern
or, Wed. May 18 at 9 pm Eastern

www.uua.org/re/teachers/webinars