

## Congregational Planned Giving Resource Sheets

---

*Planned Giving: A Smart Way to Help Now or Later Regardless of size, every bequest intention is a meaningful way to make a gift to our faith.*

### UNITARIAN UNIVERSALIST LEGACY SOCIETY

Over the years, the Unitarian Universalist Association of Congregations has achieved fiscal and institutional strength through the support of its members, longtime friends and volunteers. The planned giving program has provided essential strength to our endowment, enabling the Unitarian Universalist Association of Congregations to continue distributing the programs, resources and services that support congregational health and vitality for future generations.

Friends, members and volunteers who make legacy gifts to the Unitarian Universalist

Association of Congregations in their estate plans play a key role in ensuring that our fiscal stability endures from one generation to the next. Gifts through wills, trusts or other estate plans build our endowment, a perpetual fund with income that provides important financial support for all aspects of our work. We recognize the steadfast support of these visionary donors by extending to them membership in the UU Legacy Society.

The UU Legacy Society was created to honor its members for their commitment to Unitarian Universalism. These members recognize the critical need to assure the Association's future by providing gifts that will support the services, programs and resources that directly benefit our member congregations and districts. These services

include support for ministry and professional leadership, congregational stewardship, lifespan faith development, *UU World* magazine, youth programming, identity-based ministries, advocacy and witness, and many others on a daily basis. A careful review of your assets will identify the best way for you to make your special gift, whether it is the gift of a specific asset, such as real estate; a percentage of your total estate; or an amount for a special project or fund. Donors often find that planned gifts enable them to use assets that might otherwise be lost to estate, income or capital gain taxation to support the Unitarian Universalist Association. In becoming a UU Legacy Society member, you make an extraordinary gift to Unitarian Universalism that is a lasting memorial to your values and interests.

---

350 words / Revised 11/09



#### UUA Office of Legacy Gifts

25 Beacon Street, Boston, MA 02108

(888) 792-5885 | (617) 948-6509 | [giftplans@uua.org](mailto:giftplans@uua.org)



©Unitarian Universalist Association and The Stelter Company

The information in this document is not intended as legal advice. For legal advice, please consult an attorney. Figures cited in examples are for hypothetical purposes only and are subject to change. References to estate and income tax include federal taxes only. Individual state taxes and/or state law may impact your results.

## Congregational Planned Giving Resource Sheets

**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/](http://www.uua.org/giving/plannedgifts/)



**UUA Office of Legacy Gifts**

25 Beacon Street, Boston, MA 02108

(888) 792-5885 | (617) 948-6509 | [giftplans@uua.org](mailto:giftplans@uua.org)



©Unitarian Universalist Association and The Stelter Company

The information in this document is not intended as legal advice. For legal advice, please consult an attorney. Figures cited in examples are for hypothetical purposes only and are subject to change. References to estate and income tax include federal taxes only. Individual state taxes and/or state law may impact your results.