

The UUA's Umbrella Giving Program

A simpler way to give across Unitarian Universalism

The Unitarian Universalist Association offers the "**Umbrella Giving**" program as part of our mission to serve member congregations and the wider UU movement.

Umbrella Giving makes it possible for donors to make gifts supporting UU organizations through the UUA, and is available for many kinds of gifts, including immediate gifts as well as legacy gifts.

Umbrella Giving for Immediate Gifts

If your UU entity is unable to receive certain kinds of gifts, or if you wish for your gift to benefit multiple UU organizations, Umbrella Giving may be a good choice. Types of gifts include:

- stocks or mutual funds to an entity that does not have a brokerage account
- a gift from an IRA fund or a Donor Advised Fund where the administrator does not recognize the UU entity
- an immediate gift that you would like to divide among multiple UU entities

Umbrella Giving for Legacy Gifts

Umbrella Giving allows donors who would like to make legacy gifts to multiple Unitarian Universalist entities *including* the UUA to achieve this goal through a single gift.

After designating a gift to the UUA in your estate plans, send us a signed document detailing how to distribute your gift. After the UUA collects the gift, we will distribute it to the benefiting UU entity or entities according to your instructions.

With legacy giving, the Umbrella Giving Program:

- Simplifies your estate plan.
- Gives you access to life income gift options such as charitable gift annuities and the UUA's Pooled Income Fund.
- Provides you with support from knowledgeable and professional staff.
- Creates a way for you to give anonymously.
- Leaves a lasting legacy.

Frequently Asked Questions:

Will I pay a fee for this service? Do recipient organizations pay a fee?

No. Umbrella Giving is one of the UUA's services that is supported through the UUA's annual budget and your donations. This program allows congregations and other UU entities to utilize the services of the UUA's staff, instead of having to hire in-house experts.



UNITARIAN
UNIVERSALIST
ASSOCIATION



Do I need to include the UUA in my gift?

Including the UUA helps us continue our work on behalf of all our congregations and other UU entities, including providing this program. For immediate gifts of liquid assets we ask that you designate at least 5% to the UUA.

We ask individuals who make a legacy umbrella gift of cash or easily liquidated assets to designate at least 25% of their gift to the UUA.

Individuals making immediate and legacy gifts of real estate or other non-liquid assets should plan to designate at least 50% to the UUA.

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

No. Beneficiaries must be the UUA and UU congregations, UU theological schools, UU camps and conference centers, UU state action networks, and other UU entities.

How do I designate an umbrella gift in my will?

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

I give to the Unitarian Universalist Association (UUA) (EIN 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 signed memorandum or statement of intent I may deliver to the UUA prior to my death.

Organizations that individuals have supported through Umbrella Giving include, but are not limited to:

Unitarian Universalist Association
All Member Congregations
Church of the Larger Fellowship
Liberal Religious Educators Assoc.
Starr King School for the Ministry
Meadville Lombard Theological School
UU Ministers Association
Black Lives of Unitarian Universalism
UU Retired Ministers & Partners Assoc.
UU Service Committee
UU State Action Networks
UU Women's Federation
Various UU Camps, Conference, & Retreat Centers

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 you would like to update the UU beneficiaries, instead of having to update your will again, you simply send the UUA an updated *letter of intent*. The UUA must be included as a beneficiary.

Will the beneficiaries be notified when I make my legacy gift intention?

You can choose to have us keep this gift confidential, notify the beneficiary, 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 type of gift we will normally process and distribute the funds in about two to three weeks.

The UUA's trained staff are here to assist you in making one gift that will help multiple UU entities.

For legacy gifts contact:

Legacy Gifts Office
legacy@uua.org
(888) 792-5885, option #3

For stock and other immediate gifts contact:

Gift Processing
giftinfo@uua.org
(888) 792-5885, option #5