



# Planned Giving: A Guide for UU Congregations

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## Words of Welcome

As you begin to shape your Legacy gift program, take heart! It is not as complex or overwhelming as it may at first seem. While there are many types of planned gifts, the nuts and bolts of legacy giving are very much the same as annual and campaign fundraising: **It's all about mission, vision, and asking for the gift.**

You don't need to become a professional charitable gift planner to build a successful planned giving program in your congregation – and you don't need to do it alone. The Unitarian Universalist Association of Congregations (UUA) has resources to help you along the way. Our professional staff is here to help Unitarian Universalists make meaningful gifts for the future of our liberal religion. If a donor wishes to provide for her own congregation, we will help her do just that. If donors wish to support two or more UU entities via a planned gift, we will help them do that, too. We call it **umbrella giving**.

This guide is intended to be an overview of the *practical* more than the technical side of planned giving. For bequests and other types of planned gifts the UUA Legacy Gifts staff has the experience, resources, and expertise to help individuals complete gifts that fulfill their wishes to make a difference in Unitarian Universalism's future.

This guide will help you plan and conduct your planned giving campaign, so that you and others in your congregation can start soliciting gifts. Focus your planned giving program on asking individuals to give and you will succeed. See yourself as a donor advocate, helping UUs find ways to be generous.

As your partner in planned giving, the UUA Legacy Gifts staff strives to provide professional, timely, and reliable service and information. In addition to this guide, we offer a number of resources, in print, by phone, e-mail ([giftplans@uua.org](mailto:giftplans@uua.org)), and on line at the UUA website: [www.uua.org/giftplanning](http://www.uua.org/giftplanning).

The UUA Office of Legacy Gifts

# AN OVERVIEW OF PLANNED GIVING

In the area of planned giving, it is easy to get bogged down in legal, tax and financial technicalities. Detailed knowledge of the legal and technical aspects of planned gifts is not necessary to run a successful planned giving program in your congregation. Some general knowledge, however, will assist you in understanding how to conduct a successful planned giving program and perhaps empower you to meet with individuals and discuss how they might make meaningful gifts.

## 1. What Are Planned Gifts?

A wide range of giving opportunities fit under the planned giving umbrella, including charitable bequests, life income gift arrangements (charitable remainder trusts and gift annuities), as well as gifts of real estate and gifts that use retirement and insurance plan benefits. Planned gifts could also include other assets, such as mineral and timber rights or oil and gas leases.

Most planned gifts are deferred, meaning your designated beneficiary will enjoy the financial benefits after the donor dies. Often a planned gift is the largest single gift donors will ever make, so careful thought and estate planning is in order.

### **Many planned gifts fall into two categories:**

**Testamentary gifts** (*bequests*) are by far the most popular, reliable, and inexpensive planned gift. These take the form of specific provisions within a donor's will, stating that all or some portion of the donor's estate will be a charitable gift to your congregation.

Bequests will be made during both the leanest and the best of financial times. The recently released *Giving USA* report on levels of Charitable Giving in 2011 indicates that **total giving increased** by \$2.64 billion to \$298 billion, just under a 1% increase over 2010. ***Bequests remain the largest contributor to that growth and actually increased by 8.8% to \$24.41 billion.***

With umbrella giving, donors may make their bequest to the UUA, stipulating gifts to other UU entities. The UUA will administer the distribution of funds to all of the named beneficiaries.

**Life income gift arrangements** are another popular form of planned giving. These may take the form of charitable trusts and gift annuities. Simply stated, a donor makes a gift of \$10,000 or more (\$100,000 or more in the case of a trust), enjoys an immediate income tax

deduction for a portion of the gift, reduces some or all capital gains, and receives a quarterly check for the rest of her or his life. After the donor dies, the gift is distributed to your congregation, the UUA, a UU entity or a combination of these according to the donor's wishes. Umbrella Giving!

Planned gifts come in a variety of forms, and involve many different kinds of assets. Given this diversity, it not feasible to illustrate here *all* the ways in which planned gifts may come to your congregation. Instead of becoming experts on the details of various types of planned gifts, you and your fund raisers need to know a few basic “golden rules” that indicate someone who might be interested in making a planned gift.

**Know what gift arrangement to suggest.**

- High annual income suggests either or both a current gift and a deferred gift.
- Comfortable to low annual income, owning a lot of highly appreciated assets, suggests a gift that provides a lifetime income.
- Moderate to high degree of apprehension about financial future may suggest a gift annuity or charitable remainder annuity trust.
- Insecurity about retirement and health care costs related to aging suggests a bequest.
- Desire to reduce assets for estate tax purposes, suggests a potential life income gift.

Whatever gift may be offered, the Legacy Gifts staff is here to assist you in making it feasible for all involved. **In the end, what is most important is for you to make the call and the visit and to provide the opportunity for the donor to offer her gift.**

## 2. Why Are Planned Gifts Important?

Planned gifts, including charitable bequests made through a will, are often the single largest and most significant gifts an individual can and will make to your congregation. Individuals usually give bequests and planned gifts to what has mattered most to them in their lives – family, friends, and institutions that share their core values. The level of commitment and interest shown by a planned gift is deep and for the long-term. It is a rare person who gives away a life’s savings on a whim. Many instead evaluate their fundamental values and priorities and apply these to a plan for how they want the assets in their accumulated life estate to be distributed and used after they die.

More often than not, it is a gift intended to provide long-term or perpetual support to your congregation, the UUA or other UU entity, such as a gift to a permanent endowment. Planned gifts therefore are essential to the financial future of your fellowship, society, or congregation and Unitarian Universalism as a whole. Indeed, a planned gift can be the ultimate gift of a lifetime for both your congregation and the

donor. Planned gifts will not be made from disposable annual income or by digging a little deeper for a “stretch” gift as in a campaign. Instead, a planned gift is usually a donation made from the assets accumulated over a person’s lifetime, and it is most often a contribution to an endowment.

For some donors, a planned gift is part of an overall estate plan, which they have developed with a tax, legal and/or financial professional, since planned giving tools provide professional estate planners useful options for helping clients increase current income in a tax-favored manner, while providing vehicles for diminishing a client’s assets for estate tax. Tax savings are seldom the primary or sole motivating forces for charitable contributions. In some instances, however, the tax benefits of philanthropy allow some individuals to give more than they initially thought possible.

### 3. Who Gives?

Have you asked your older congregants to make a charitable bequest to your congregation? Conventional wisdom holds that people between 55 and 70 years in age are the most likely age group to make planned gifts.

At any age, in every economic circumstance, charitable bequests are by far the most commonly used form of planned giving. Bequests are relatively inexpensive to arrange, they are "no risk" gifts, they are easy for congregations to promote, and for people with high net worth, they save \$1 in estate taxes for every dollar given. All a donor needs to do is complete a legal will. **All you have to do is ask.**

By any measure, many Unitarian Universalists are at a point in their lives to make a commitment to the future of our liberal faith. Your congregation's mission or "vision" statement therefore should be compelling. How contributions will actually be used should be common and public knowledge. If gifts are going to your endowment fund, prospective donors will want to know how their gifts will be invested and managed, how endowment earnings will be allocated for spending or re-investment, and under what circumstances, if ever, the principal might be invaded.

#### **Identify individual prospects with these common characteristics:**

- Committed to Unitarian Universalism, locally and as a religious movement
- Has given generously to the congregation
- Over age 55, with no pressing family obligations
- Has more than one source of income - unearned income, rents, royalties, etc.
- Owns highly appreciated assets (real estate and stock in particular).

### 4. What Isn't Planned Giving?

It is important to remember at the outset that planned giving is distinct from other types of fund raising typically done in your congregation.

The annual canvass, for example, seeks contributions to fund the operating budget. People expect to be asked to make a pledge each year and make donations from disposable annual income. Pledges are paid in installments, usually by check, and increasingly by electronic fund transfers, using credit or debit cards. Occasionally stock gifts are made.

A capital fund drive seeks financial resources for specific projects, such as building improvements, facility expansion, or land purchases. These occur, at their shortest possible interval, once every five years. Capital campaign pledges are usually three to five times larger than the individual annual canvass pledge amount. Pledge payments are made over three to five years, and donors usually have to “stretch” their financial resources to contribute. People may dip into savings or use non-cash assets to make a campaign gift.

On the other hand, a planned giving program could be described as work that has a beginning, but has no end, unlike both the annual canvass, which occurs within a set amount of time (weeks, maybe months), and a capital campaign, which begins and ends in a matter of years. Planned giving programs are forever. People will give to endowment funds at different times of their lives – most will do so at death. Their lives, not the church calendar or the schedule of a building project, will determine when they are ready to make their ultimate gift to the endowment.

## 5. TIPS AND TRAPS

**Boundaries** - In the enthusiasm to assist individuals in completing their gift plans, beware of becoming a personal advisor or offering legal or financial advice. It is inappropriate, even unethical, for a fund raiser to exercise undue influence or to direct a donor's personal affairs. It is always prudent to be mindful that your role is as a fund raiser securing contributions for the church. That doesn't mean that you cannot be of some help, but it does mean that you need to guard the boundary between providing information and becoming a donor's personal representative or certified financial planner or attorney. *Indeed, it would be a conflict of interest if you were.*

**Professional Resources** – To help people find a qualified professional who can review their gift plans and advise them on their options, develop a list of reputable professionals in your community and make it readily available. Always encourage donors to seek independent qualified counsel before they commit to a gift plan of any significance or complexity. Avoid the temptation to promote a particular professional as legal or financial planning counsel for your planned gift donors. To insure against any hint of conflict of interest, your donors need to make an informed decision and choose

their own independent counsel to look after their interests. The congregation should not make the choice for them.

Attorneys, real estate brokers, bankers, accountants, stockbrokers, financial planners, and life insurance agents who are members of your congregation can be a tremendous help to your program. They can give referrals to excellent professional advice (helping you to create a list of local attorneys people might contact for estate planning and wills preparation, for instance), present workshops, and join the team to ask for gifts. Professionals who are members of your congregation will do a great service if they join the planned giving committee and help the church to obtain its own independent counsel at modest fees, if not for free.

**Fear of the Unknown** – Church volunteers faced with the prospect of being responsible for conducting a planned giving campaign often feel at a loss to understand the technical complexities of the more sophisticated planned giving vehicles. This feeling manifests itself in a fear that keeps most volunteers from attending to the most important part of planned gift fund raising: talking one-on-one with potential donors.

**Don't let the fear of not having all the answers stop you from making calls and meeting with donors.** Be willing to admit to a donor that you don't have all the answers. Authenticity and openness will build trust. You will have success if you speak about what you know, i.e., why your church and Unitarian Universalism are important and worthy and in need of financial support. This is what is most important.



## HOW TO BEGIN A PLANNED GIVING PROGRAM

Someone once said, “Fund raising is a spiritual exercise,” and that rings true. Whether you are conducting a car wash, a bake sale, the annual canvass, a capital campaign, or building your endowment, fund raising is very personal. It takes discipline, love, perseverance and creativity. It is part art, part science. There is no “one size fits all” plan or guaranteed pattern for success. There are, however, proven techniques, tools, and practices for effective fund raising. They are:

- Set a goal.
- Find someone to lead the fund drive.
- Recruit volunteers to help and give them clear, achievable tasks.
- Identify who will be asked to make a contribution.
- Meet face to face with donors when you ask for the gift/pledge.
- Say thank you for every contribution.
- Keep careful records of financial support.
- Report how the money has been used.
- Publicly recognize supporters.
- Say thank you again. Thank donors and volunteers (repeat this step liberally).
- Fund raising leaders and volunteers deserve a lot of thanks and public recognition.

This is important to recruiting new leaders and volunteers.

All types of fund raising use these basic tools and techniques. Planned giving therefore is not much different than other fund raising activities, in which you may have been involved in your congregation. Yet, unlike the annual canvass or the a capital campaign, planned gift fund raising usually takes more time and personal attention before and after the gift or pledge to give is completed.

Organizing a planned giving program can seem overwhelming and complicated. Like all fundraising, it is a challenge. With a bit of knowledge and a lot of willingness to listen, talk and visit with potential donors, you can have a successful planned giving program. Whatever your circumstances, the most important things to do are these:

1. Identify five or ten people you can visit and ask for a planned gift this year. And do it.
2. Identify five or ten more people you will visit and ask for a planned gift this year or next.
3. Encourage everyone to complete a legal Will and include a gift to our UU future.

Keeping these three simple principles in mind, you are now ready to consider a broader outline for carrying out a planned giving program.

## An Outline for a Successful Planned Giving Program

### A. Preparation

*Involve the Board and professional staff; get their support*

*Consult with other leaders in your congregation*

*Form a planned giving committee*

*Create a plan for recognizing generous donors, such as a Legacy Society*

*Compose a mission statement for the planned giving committee*

### B. Gift Guidelines

*Propose guidelines for the Board to consider and approve.*

*Guidelines might address these questions:*

- What do we do when we receive an unrestricted bequest? Does it automatically go into the endowment?
- Under what circumstances will we credit a bequest to the operating budget? Who would make this decision?
- Are there any purposes/uses we would like to encourage?
- Who should review and approve/decline gifts with restrictions?
- Are we equipped to handle stock gifts? If not, contact the UUA for assistance.
- Are we equipped to handle gifts of real estate? If not, contact the UUA for assistance.

### C. Endowment Funds

*Consult the Endowment Fund web pages:*

*[www.uua.org/finance/investment/174299.shtml](http://www.uua.org/finance/investment/174299.shtml) for detailed information about this topic.*

- If you have an endowment fund, review statements of its purpose, investment policies, and any rules that exist for directing gifts. If you do not have an endowment fund, consider establishing one before any gifts arrive.
- Donors usually want to know that a gift to the endowment will be managed well, with good investment strategies, regular reports to the congregation (and to donors), about the financial status of the endowment.
- Donors also want to be assured that the congregation is fiscally sound in its management of the fund, using for its express purposes, and has a plan for making decisions should the need arise to invade principal.

### D. Identify who might be most interested in supporting the long-term vitality of your congregation.

- Speak with leaders and long-time members to find out who might already have your congregation in their estate plans.
- Review the church directory and make a list of the 10 best prospects, the people who are most important to speak with first.
- Make a gift yourself.

**E. Ask for the Gift (Cultivation)**

*Preparing to Contact Prospective Donors*

- Who will ask?
- When?
- Arrange visits with people who are prospects.

*Making the Visit*

- Visit and talk to prospects about what your congregation means in your life and ask them what the congregations has meant to them.
- Listen.
- Bring news about programs of particular interest to each prospect.

*After the Visit*

- Follow-up with personal notes, say thanks for taking time to meet, and way when you'll next be in touch.
- Follow-up with phone call to answer questions.
- Stay in touch – but go easy.
- Contact the UUA for assistance with gifts.

**F. Stewardship and Accountability**

- Thank your contributors.
- Keep them informed about how their gifts are being used or will be used.
- Recognize them – at special events, on a wall plaque, in announcements.
- Plan events of interest to them.
- Strengthen the connection to Unitarian Universalism.

**G. Long-term Marketing**

- Write newsletter announcements.
- Write articles featuring generous donors after receiving their consent.
- Develop literature and brochures.
- Hold dinners or special events to honor of the Legacy Society.
- Hold a seminar/workshop series on charitable estate planning.

# Elements of a Successful Planned Giving Program in Your Congregation

## 1. Form a Planned Giving Committee

The size of your congregation will determine how you approach planned giving. One very committed volunteer can accomplish a great deal in a group of 70-100, but a team is always more fun and is an effective way to train others in this kind of fund raising. Larger congregations will need more volunteers who can help identify planned gift donor prospects, visit individuals, develop marketing materials, and find ways to keep senior members involved and feeling appreciated in the life of the congregation. Stewardship of the UU movement is a responsibility to be shared and passed on. Consider including young adults and youth on the Planned Giving Committee. It will be an education for them and for you.

### A Planned Giving Committee may be expected to:

1. Make the case for gifts to the endowment.
2. Institute a "Bequest Recognition Society" to honor and thank those who have already arranged a gift to the church from their estate.
3. Identify individuals who are likely to complete a planned gift.
4. Visit or make sure people are visited and asked face-to-face for a gift commitment.
5. Thank and recognize generous donors.
6. Educate and motivate leadership and general membership toward a theology of abundance and generosity.
7. Publicize and encourage bequests and other planned gifts.
8. Recruit, train, and manage volunteers as needed, and thank them.
9. Plan for and implement gift acceptance guidelines and procedures.
10. Collaborate and cooperate with other fund raising committees.
11. Understand how the UUA Legacy Gifts team can help.
12. Sponsor special seminars and events.

## 2. Inform and re-inform lay and professional leadership of the benefits of Planned Giving.

Most people have heard about planned giving in one way or another, but don't assume they fully understand it or know how it can make a difference in their lives and in the life

of your congregation. Consider making a presentation to your governing Board and other key leaders explaining the "win-win" opportunities a Planned Giving program creates.

Tell them how the UUA can help, with resources, advice, and our **Charitable Gift Annuity**. This gift arrangement makes payments to one or two people for the rest of their lives. Upon their deaths a significant gift comes to your congregation and/or the Association as a whole. Assets are invested in a socially responsible manner, and held in trust at State Street Global Advisors in Boston, Mass.

Also, if your congregation has no endowment fund or no guidelines for an existing fund, we suggest you recommend to the leadership of your congregation to create guidelines now. Please visit [www.uua.org/finance/investment/174299.shtml](http://www.uua.org/finance/investment/174299.shtml) for information about endowment funds.

Repeat this exercise periodically. Follow up with handouts and a personal visit to ask for the leadership to make a commitment to provide a gift in their Wills or some other kind of planned gift. When your professional and lay leaders know what Planned Giving has to offer, they can both apply it in their giving and help identify others who might enjoy giving to the future of Unitarian Universalism.

### **3. Structure your program carefully.**

Your Planned Giving program should *create momentum* through marketing. Include short testimonials during Sunday services, place announcements and gift stories in your newsletter and publicize a list of people who already have Unitarian Universalism in their Wills. Write letters, use brochures, make a permanent Legacy display in the church building. Include people of all ages. Create opportunities to recognize and honor your elder members and their service to our UU community. They will feel appreciated for their living history, memories, and experience.

Cultivate your planned giving prospects. Discover what they really like about your UU community, visit them regularly, and find ways for them to get involved. When they give, thank them and recognize their contribution publicly. This may be particularly important for someone who does not get out very often.

#### **4. Identify your planned gift prospects.**

Review your current membership and friends of the congregation lists. Ask a few people who know the congregation well to look over the list and help you identify who is likely to make a charitable bequest of some kind.

Here's a profile of a planned gift prospect: Someone who is over 55; has met his or her family obligations, or is single; is deeply committed to Unitarian Universalism; contributes to your congregation; and has both the means and the inclination to make additional contributions.

Your best prospects often are people who already give generously to your congregation. But do not overlook others. Simply because someone gives a small amount to the canvass does not mean they have nothing more to give. People on limited incomes would love to be asked to make a bequest or sign over a life insurance policy they no longer need. Every adult should be encouraged to remember your society, fellowship, or church in his or her wills.

#### **5. Ask for the gift. Ask for the gift. Ask for the gift.**

Each congregation's resources for a Planned Giving program will be different; for instance a congregation of 500 members has different resources than does a congregation of 55. Whatever your circumstances, as mentions earlier, the most important things to do are these:

1. Identify at least 10 people you can visit and ask for a planned gift this year.
2. Identify 10 more people you will visit and ask for a planned gift this year or next.
3. Encourage everyone to complete a legal Will and include a gift to our UU future

You may want to create a brochure outlining the purposes of your endowment fund and highlighting ways to support it. Just remember, people give to people and to something they care about deeply. A brochure alone, no matter how well conceived, will not bring in gifts. You will. It is always good practice to make your own contribution before you ask someone else to give.

#### **6. Create a *Bequest Recognition Society*.**

Every UU society, fellowship, and congregation should encourage and promote gifts by Will. Find out who in your congregation already has a charitable bequest for the church in their Wills. Invite them to tell you why they have done this, and ask them to be charter members of your congregation's *Bequest Society*—a society organized to recognize and thank generous members who have arranged a charitable estate gift that

will benefit your congregation. Explain that their good deed is the best way to convince others to do the same.

Ask the charter members if they would be willing to speak with others about why they have provided for the future of the congregation. Would they write something for the church newsletter? Do they know others who should be invited to join?

Give the Society a meaningful name. Encourage participation and imagination in naming it. Ask the artists in your congregation to contribute, by writing poems, songs, painting, drawing, whatever they can to make the bequest society as inviting as possible. Have fun with it.

Create a brochure about the Society and include a mission statement that will inspire others to join. Include suggested language for designating a gift to your congregation. Offer anonymous membership, but do ask people to share some information about their gift plan.

Publish a list of the Society members; or start a permanent recognition wall or banner.

Identify a group of people who are likely to be interested in providing support after they are gone. Send them formal invitations to join the Society; enclose a reply card for them to return to request more information or to signal that they do have a bequest in place. Follow up with a phone call and a personal visit. Enlist the help of others, including Society members and people under 30.

Offer special events and programs for Society members, and create opportunities to say thank you and keep them involved. Ask the religious education program to have the children interview Society members and write biographies of their lives.

Develop a list of reputable and reasonably priced legal and financial planning services available to your community. It is best for a congregation not to offer free or reduced legal services to its members, nor to ask a member to do so. A contested estate could come back to haunt you and cost a great deal of time and money. Ask the professionals in your congregation to help prepare review a list of legal and financial resources; their names may be included, and what fees they arrange with their clients is up to their own discretion and professional ethics.

## **7. Prepare to receive record and administer gifts.**

Your program also needs to be able to process and administer gifts. Obtain the services of a broker to receive gifts of securities, mutual funds and the like; some might do this for a reduced fee or *gratis*. Work out an accounting system for gifts to the endowment.

Make sure all contributions are properly acknowledged. Consider arranging for Board members to thank donors.

## **8. Say thank you!**

Always say thank you. When someone joins the Bequest Society, thank him or her for his or her generosity and foresight. Ask members of the governing Board to say thank you, too.

## **9. Honor, recognize, and involve donors in the life of your congregation.**

Treat your Bequest Society members and other planned gift donors well, and many of them will give again. Someone who has provided a bequest to the church is deeply committed and may be moved to do something special during their lifetime. Similarly, someone who can afford to make a \$10,000 contribution to the UUA Charitable Gift Annuity Fund may one day provide a considerably larger charitable bequest.

An occasional note or visit, a community service project, an annual dinner or monthly forum, a trip to the art museum, botanical garden or the symphony, and a simple telephone call are all ways to express appreciation to those who care enough about the congregation to give to its future. Some of your planned gift donors may be housebound or otherwise restricted from social activities; they will particularly enjoy opportunities to be with others.

## **10. Avoid the temptation to over-emphasize the technical or to provide legal counsel.**

It's easy to get lost in the technicalities of planned giving (tax deductions, tax rulings, and complex gift vehicles). Your most successful efforts will be "people-centered" and "value-centered." Your planned giving program exists to help individual Unitarian Universalists give to something in which they find great value, Unitarian Universalism. Your purpose is to make it possible for people to fulfill a desire to help our liberal religion, to help our values survive the centuries and serve future generations.

When you meet with someone, when you write a letter or something for the church newsletter, or when you create a brochure emphasize the human story, the spiritual satisfaction giving has to offer. When we commit financial resources to our religious values, great things radiate, inwardly and outwardly, strengthening our connection to the community we cherish.

## **11. Evaluate and revise your program frequently.**



Every 3-5 years, review the work of your committee. Review policies and procedures. Study the gifts you have received, looking for patterns that might guide your work for the next few years.

**12. Develop a working partnership with the charitable gift and estate planning staff at the Unitarian Universalist Association:**

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[www.uua.org/giftplanning](http://www.uua.org/giftplanning)

## **A Dozen Ways to Promote Planned Giving in Your Congregation**

1. Meet face to face with individuals who could make a gift. Talk about why your fellowship, congregation, or society matters. Ask them if they would like to “leave a legacy” for Unitarian Universalism.
2. Publish announcements in the newsletter. Run an ad reminding church members to “Remember [Your Congregation’s Name] in Your Will.” Ask an artistic member to design an ad.
3. Schedule brief testimonials for Sunday Service. Someone who has included the congregation in their Will could tell others why they did it. A member of the planned giving committee could remind people who to contact if they want to explore ways to make a gift to the endowment.
4. Publicly recognize bequest donors. Some people prefer to remain anonymous, but many are more than willing to be interviewed for a newsletter article, or for a brief posting on a bulletin board. Thank them during a church gathering.
5. Create a bulletin board display with information about church mission and finances. Use bright colors and bold, catchy headings. Create an atmosphere of generosity and build awareness regarding the congregation's fiscal well-being.
6. Create some informal posters about each planned giving vehicle and rotate their display at the church. Include a contact person (with phone number to call) for those people wanting more information.
7. Work with the religious educators in your congregation to see if there are any intergenerational opportunities. A series on giving and stewardship could have young people interviewing the founders of the congregation and sharing what they learn with the whole congregation.
8. Compile a list of trusted professionals to share with members who need to find help with personal accounting and investing, to review their estate plans or write a new Will.
9. Keep your professional staff and lay leaders informed about your planned giving program. Let them know how many people have arranged a charitable bequest,

or a gift annuity, or whatever. Ask the president/chair of the Board to thank people for this support.

10. Survey your members to find out what questions and concerns they have regarding their personal financial planning. Many may want more information on pension distributions, assigning benefits, 401(k) rules, providing for heirs, value-based philanthropy. Many may want information on preparing health care proxies, evaluating long-term care insurance, and the like. Use the responses to plan a series of events that will address their concerns.
11. Gather people together for special events. Someone who already has arranged a gift to the congregation in their Will might be willing to invite others to dinner at their home and use the occasion to encourage these guests to be generous too.
12. Visit the website of the Unitarian Universalist Association:  
[www.uua.org/giving/planned](http://www.uua.org/giving/planned) Learn what is available for planned gifts.

### Written Resources for Planned Gifts

#### **Brochures**

The UUA Office of Legacy Gifts offers brochures for free. Call (888) 792-5885 or visit [www.uua.org/giving/planned/100780.shtml](http://www.uua.org/giving/planned/100780.shtml) to download pdfs of our brochures.

**Planned Giving: Management, Marketing, and Law.** Ronald R Jordan and Katelyn L. Quynn. John Wiley & Sons, Inc.: New York, 1995. ISBN 0-471-30952-4. A thorough and easy-to-read description of every aspect of planned giving. To order, contact John Wiley & Sons, Inc., 605 Third Avenue, New York, NY 10158-0012. (800) 225-5945

**Conrad Teitell's Portable Planned Giving Manual.** Conrad Teitell. Taxwise Giving, 13 Arcadia Road, Old Greenwich, CT 06870. The manual costs \$175, and is huge. Intended for the seasoned professional, providing Internal Revenue Code and Revenue Ruling citations for everything under the sun. To order, call (800) 243-9122.

**The Local Church Planned Giving Manual.** Stella A. Schoen, Editor. Published by the United Church of Christ Planned Giving Ministry and intended as a guide for congregations that want to encourage bequests and other planned gifts. PDF format. <http://www.ucc.org/giving/local-church-planned-giving.html>

## Vendors and other Providers of Planned Giving Materials

The following companies publish and sell promotional and educational materials about how to make charitable gifts of stock, real estate, life insurance, retirement/pension plans and introductions to how gift arrangements such as wills, bequests, charitable trusts and charitable gift annuities work. You may contact them directly to request a catalogue and free samples of their marketing materials.

**Contact the UUA Office of Legacy Gifts for information on receiving brochures for your congregation.**

**UUA Office of Legacy Gifts**

25 Beacon Street  
Boston, MA 02108-2800

[www.uua.org/giftplanning](http://www.uua.org/giftplanning)

E-mail: [giftplans@uua.org](mailto:giftplans@uua.org)  
617-948-6509

**Robert F. Sharpe and Co., Inc.**

5050 Poplar Avenue  
Memphis, TN 38157

[www.rfSCO.com](http://www.rfSCO.com)

800-238-3253

**Conrad Teitell**

*Taxwise Giving*  
13 Arcadia Road  
Old Greenwich, CT 06870

[www.taxwisegiving.com](http://www.taxwisegiving.com)

E-mail: [info@taxwisegiving.com](mailto:info@taxwisegiving.com)  
800-243-9122

**Planned Giving Today**

100 Second Avenue South, Ste. 180  
Edmonds, WA 98020

[www.pgtoday.com](http://www.pgtoday.com)

800-525-5748

**National Committee on Planned Giving**

233 McCrea Street, Ste. 400  
Indianapolis, IN 46225

[www.ncpg.org](http://www.ncpg.org)

317-269-6279

**The Stelter Company**

10435 New York Avenue  
Des Moines, IA 50322

[www.stelter.com](http://www.stelter.com)

800-331-6881

**Pentera, Inc.**

8650 Commerce Park, Ste. G  
Indianapolis, IN 46268

[www.pentera.com](http://www.pentera.com)

317-875-0910

**Indiana University Center on Philanthropy**     [www.philanthropy.iupui.edu](http://www.philanthropy.iupui.edu)  
317-274-4200

**CASE: Council for Advancement and Support of Education**  
[www.case.org](http://www.case.org)  
202-328-CASE [2273]

**PG Calc** - Planned Giving software and resources  
[www.pgcalc.com](http://www.pgcalc.com)  
E-mail: [info@pgcalc.com](mailto:info@pgcalc.com)  
888-497-4970