

## Congregational Planned Giving Resource Sheets

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### **A Charitable Bequest: A Gift You Plan Now, Make Later**

Rare is the person who regrets having been truly generous or thoughtful. Yet, how can you give away property, securities or real estate now if you do not know whether you or your family will need those assets later? One solution is to make gifts to our congregation by means of a bequest—a gift in your will.

#### **Following are some of the advantages of bequests:**

- **Easy.** A few sentences in your will complete the gift.
- **Revocable.** Until your will goes into effect, you are free to alter your plans.
- **Versatile.** You can bequeath a specific item, an amount of money, a gift contingent upon certain events, or a percentage or remainder of your estate.
- **Tax-wise.** Your estate is entitled to an unlimited estate tax charitable deduction for gifts to qualified charitable organizations.

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Additional planned giving resources can be found at: [www.uua.org/giving/plannedgifts/](http://www.uua.org/giving/plannedgifts/)



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