

# Congregational Planned Giving Resource Sheets

---

## **MAKE IT SIMPLE.**

## **MAKE A BEQUEST.**

## **MAKE A DIFFERENCE.**

### **Include Us in Your Will and Help Shape the Future**

## **YOU CAN**

Without much effort, you can make a long-lasting impact on the future of Unitarian Universalism. In addition to its simplicity, a bequest to support the Unitarian Universalist Association will allow your assets to be available to you throughout your lifetime.

## **MAKE A DIFFERENCE**

An unrestricted direct bequest in your will or trust of a specific sum of money, a percentage of your estate or a particular asset will help to ensure a secure future for Unitarian Universalism.

## **FIND OUT MORE**

We are available to provide you with more information on gifts that fit your financial and philanthropic goals. Please contact us or go to [www.uua.org/giftplanning](http://www.uua.org/giftplanning).

---

*126 words / Revised 11/09*

**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.