

The UUA's Umbrella Giving Program

The simple way to give to Unitarian Universalism

As an association of congregations, our UUA puts its combined strengths to work for the benefit all Unitarian Universalist organizations. That is why, as part of our mission to serve our member congregations and the wider movement, the UUA has developed a simple and creative solution that we call “**Umbrella Giving.**”

What is Umbrella Giving?

Umbrella Giving allows entities under the UU umbrella to receive gifts through a single donation to the Association.

How does this work?

The process is simple. You make a single gift to the Unitarian Universalist Association and let us know how you would like your gift to be distributed. The UUA in turn distributes the gift and notifies the benefiting UU entity according to your instructions.

Why would I want to use the UUA's Umbrella Giving Program?

The Umbrella Giving Program:

1. Simplifies your estate plan.
2. Gives you access to life income gift options such as charitable gift annuities.
3. Provides you with support from knowledgeable and professional staff.
4. Allows your congregation to focus its resources on programming instead of gift administration.
5. Creates a way for you to give anonymously.
6. Leaves a lasting legacy.

What types of gifts are eligible?

Any gift given to the UUA can be an umbrella gift. This includes outright cash and gifts of stocks and mutual funds as well as planned gifts such as bequests and gift annuities.

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

No. Umbrella Giving is one of many of the UUA's services that is supported through the UUA's annual budget. This program allows congregations and other UU organizations to utilize the services of the UUA's planned giving staff, instead of having to hire in-house experts. We encourage individuals who make an umbrella gift of cash or easily liquidated assets to designate at least 25 percent of their gift to the UUA to help us continue our work on behalf of all our congregations and other UU entities, but the final distribution of the gift is entirely up to you.



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

No. The Umbrella Giving Program was established to serve the larger UU community. Umbrella gift beneficiaries must be UU Congregations, regions/districts, theological schools, UU camps and conference centers, and other UU entities.



How do I designate an umbrella gift in my will?

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

I give to the Unitarian Universalist Association (UUA) (tax I.D. number 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.

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 at any point you want to update the beneficiaries, instead of having to update your will again, you simply send the UUA an updated *letter of intent*.

Will the beneficiaries be notified?

This decision is yours to make. You can choose to have us keep this gift confidential, notify the beneficiary of your umbrella gift, 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 vehicle we will normally process and distribute the funds according to your intentions within two business weeks.

The Association's resources and trained professional staff are here to assist you in making one gift that will ultimately help multiple Unitarian Universalist entities. Put our UUA to work to benefit the UU organizations you love!

**Unitarian Universalist Association
Office of Legacy Gifts
24 Farnsworth Street
Boston, MA 02210-1409**

Through the UUA's Umbrella Giving Program, individuals have supported organizations including:

All Member Congregations
UU Districts & Regions
Unitarian Universalist Association
Church of the Larger Fellowship
Liberal Religious Educators Association
Meadville Lombard Theological School
Starr King School for the Ministry
UU Ministers Association
UU Retired Ministers & Partners Association
UU Service Committee
UU United Nations Office
UU Women's Federation
Various UU Camps, Conference,
& Retreat Centers

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