

Use Your Will and Beneficiary Designations to Give to Unitarian Universalism

If Unitarian Universalism is like family to you, consider naming it as a beneficiary.

Whether you are writing your first will, updating an existing will, or designating beneficiaries on your retirement account, life insurance policy, savings account, donor advised fund, or commercial annuity, we hope you'll include a gift for our Unitarian Universalist Association, your congregation, or other UU organizations. In a world where hate and oppression make claim to religious truth, Unitarian Universalism offers love, democracy, and compassionate justice. A gift to Unitarian Universalism will bring you joy and will strengthen and extend our faith.

You don't have to be a millionaire to make a difference in the world.

Bequests and beneficiary designations are for everyone and anyone. They are sensible and simple gifts, and allow you to be a Unitarian Universalist philanthropist *and* keep your financial options open. You can use a bequest in your will to give a specific dollar amount, a percentage of your estate, or a specific item, such as real estate. You can use a beneficiary designation to give a percentage of a retirement account, life insurance policy, savings account, donor advised fund, or commercial annuity. However you wish to give, we want to make it easy.

Your bequest or beneficiary designation is a statement of faith - - faith that our Unitarian Universalist movement and its voice for compassionate justice and religious freedom are important now, and will be important long after we are gone. When you demonstrate that you care enough about Unitarian Universalism to support its future, others will follow your generous example.

Bequests and other estate gifts come in all shapes and sizes and are as different as the people who create them.

Some bequests are unrestricted, given for general purposes. Our UUA or your congregation can put these gifts to use where they are most needed.

Some bequests are restricted, given for very specific purposes, such as the permanent endowment, building maintenance, or a long-term project. The UUA welcomes bequests directed to areas such as congregational growth, social justice, public witness, scholarship assistance for ministers and religious educators, relief funds for religious professionals and families in need, lay leadership training, Beacon Press, Skinner House Books, UU World magazine, and youth, campus, and young adult programs. We are happy to discuss options with you.

Sample bequest language is included in this brochure for you to share with your attorney. If none suits what you have in mind, please contact the UUA Office of Legacy Gifts. We are happy to help!



Testamentary Charitable Remainder Trust

A trust document is created during your lifetime, with a “pour-over” will to designate which assets are to be placed in a trust with the income paid to specific individuals for their lifetimes. Upon the death of the last income recipient, or after a term of a specified number of years, the trust terminates and assets are transferred to the UUA, a congregation or UU entity, completing your gift.

Suggested Bequest Language

Please share the following suggested bequest language with your attorney to assist in drafting a will or codicil or to designate your congregation, our UUA, and other UU entities as a beneficiary of your estate. The UUA federal identification number is 04-210-3733.

Unrestricted Gift

I give to the [Unitarian Universalist Association, located in Boston, Massachusetts], [___% of my estate or the sum of \$_____] for its general purposes.

Restricted Gift

I give to the [Unitarian Universalist Association, located in Boston, Massachusetts], [___% of my estate or the sum of \$_____] to be used for [stated purpose]. If at any time in the judgment of the organization’s board of trustees it is deemed impossible or impracticable to carry out the above purpose, said trustees shall determine a purpose as near as possible to that description above.

Beneficiary Designations

Consider naming your congregation, the UUA, or other UU entities as the beneficiary of your existing account in a donor advised fund, a retirement plan, IRA account, a life insurance policy, bank account, or commercial annuity. Here’s how:

1. Contact your retirement plan administrator, insurance company, bank or financial institution for a change of beneficiary form. Sometimes these forms are available online.
2. Decide what percentage (1 to 100) you would like us to receive and name us, along with the percentage you choose, on the beneficiary form.
3. Return the completed form to your plan administrator, insurance company, bank, or financial institution.

For further information, please contact:

Unitarian Universalist Association, Office of Legacy Gifts

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(888) 792-5885

legacy@uua.org

www.uualegacy.org

As with any substantial gift, we recommend that you consult your legal and/or tax professionals to ensure that your plans are structured to achieve the overall result you are seeking.