

WHERE DO I BEGIN?

Think about your values and how you can pass them on when you are no longer here.

Talk with your attorney about amending your will or trust to include a bequest for the Fellowship.

Consult your financial advisor or accountant to determine if a gift annuity or charitable remainder trust would be advantageous to you.

LEGACY SOCIETY

If you have made a bequest in your will or trust or have created a gift annuity or charitable remainder trust, the Fellowship would like to include you on a list of members of the Legacy Society in recognition of members and friends committed to the long-term strength of our Fellowship. Please contact the Fellowship Administrator to discuss your plans.

*Rare is the
person who regrets
having been
truly generous
or thoughtful.*

The Unitarian Universalist Fellowship of Door County is a community of faith committed to the freedom of intellectual and spiritual inquiry and to the promotion of the worth and dignity of all persons through service to its members, friends and the larger community. The Fellowship was founded in Door County in 1997. It carries on the Unitarian Universalist traditions and history.



UNITARIAN UNIVERSALIST FELLOWSHIP
OF DOOR COUNTY

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Your Legacy

Unitarian Universalist
Fellowship of Door County

SUSTAINING THE FELLOWSHIP INTO THE FUTURE

Planned Giving is a way for you to participate in the future of the Fellowship.

There is something in each of us that wants to preserve and sustain this community . We want it to live on far beyond our own lifetime. The perpetuation of the Unitarian Universalist Fellowship of Door County, a liberal religious community, is important to us today and to future generations. We invite you to help shape that future.

PLANNED GIFTS

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 way is to make gifts to our congregation by means of a **bequest**—a gift in your will or trust.

Below are some of the advantages of bequests:

- Easy. A few sentences in your will or trust will complete the gift.
- Revocable. Until your will goes into effect, you are free to alter your plans.

- Versatile. You can bequeath an amount of money, securities, real estate, 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.

OTHER OPTIONS

You can designate the Fellowship as the beneficiary of your life insurance policy, IRA account or other retirement plan. There are a variety of life income arrangements such as Charitable Remainder Trusts, Gift Annuities, and a Pooled Income Fund. These are designed to provide income to the donor during his or her lifetime with the principal going to the Fellowship upon the donor's death. The Unitarian Universalist Association (UUA) offers to administer several of these options. You will find more information at uua.org/giftplanning.

Please know that any contribution helping the Fellowship secure its future is appreciated.

HOW WILL MY GIFT BE USED AND MANAGED?

You may make an unrestricted gift or restrict it in some general way such as:

- Building maintenance or expansion, the Memorial Garden or to support a specific program area of the Fellowship.
- A restricted gift to the Legacy Fund could specify that the principal of the gift is to be preserved to generate income long term for the Fellowship.

The Fellowship is committed to investing all funds in a socially responsible manner.

