

# Building an Endowment to Ensure the Fiscal Health of our Church

**Planning for the future:** We all strive for some measure of joy, health, and prosperity for ourselves and our families. This is what we also hope for our Church. A healthy endowment helps ensure the long-term financial well-being of the church and strengthens our mission as a welcoming, service oriented, justice seeking congregation.

You can influence the future of this Church in a positive way by remembering it in your will or donating anytime to the Unitarian Universalist Church of Amherst Endowment Trust. It is an opportunity to give back to the church in a way that helps to ensure its long-term financial health and security so it can thrive and prosper in the future.

**How to give:** There are several ways you can make a gift to the Endowment. You can make a tax-deductible inter vivos (aka lifetime) gift at any time: a gift in memory of a loved one who has died; or a gift in honor of someone, perhaps at special time such as a birthday or anniversary. You can also include a bequest in your Will – either a specific dollar amount, or a percentage of your estate. Or you can name the Church as a beneficiary of a trust, a life insurance policy or a retirement account.

It doesn't necessarily mean writing a check! An alternative is to donate appreciated stock, mutual funds, or other property (escaping the tax on the capital gain). Since tax rules are constantly changing, as is your own circumstance, you may want to consult with your tax and/or financial advisor to see what method makes sense for you.

**How much to give:** Only you can determine this. We recommend that you consider how much the church has meant to you when deciding. In addition to lifetime gifts to the

UUCA Endowment Trust, you might consider a provision in your Will dedicating either a set amount or a percentage of your estate, confident that this choice will not substantially deprive your heirs.

These endowment donations, added to that of others who feel as you do, will make an immense difference to our Church. Regardless of how or how much you give, your efforts will continue to have a helpful, formative effect on our Church.

**Drafting or updating your will:** A Will protects those you love and guides your executor in paying your debts and distributing your probate assets. In some situations, you may want to pair your Will with a trust. Provisions in your Will, as well as any testamentary provisions in a trust, tell your executor or trustee how much to give to whom after you die.

Without a Will, the State laws where you reside will determine who gets your probate assets and a Court official will appoint a guardian for any dependents. You lose the opportunity to make these choices, as well as to recognize people and organizations who are important to you (e.g. your Church!); and you lose the chance to plan for any tax implications and to maximize the transfers to chosen heirs and legatees. And if you have residences in more than one state, complications may arise if it is not easily determined which state is your legal domicile.

Certain assets can avoid probate by naming a beneficiary, providing a TOD designation or naming those who inherit after a life estate.

You should contact your attorney to draft or update your Will to ensure that your wishes are

followed. You may also wish to involve a tax or financial advisor as you work through the estate planning process.

**The benefits of giving:** You can feel secure in knowing that your gift is supporting the long-term health of the church and helping to support the future of liberal religion in this community. Your gift will be acknowledged and memorialized in the Endowment Memorial Book and on the Endowment Giving Tree displayed in the Solarium near the back of our chapel. Families of those being memorialized by your gift are notified by letter.

**Your action today** will last beyond this time and is one of the ways a Unitarian Universalist can continue living in the memory of others. You can be a real help in insuring that our Church will be here to receive those looking, as you once did, for a place that will accept and understand them. Although it is always easy to procrastinate, your individual future and the future of our Church will happen, planned or unplanned. It will be better for all if you choose to plan...today.

**For more information** about how the Trust operates, please refer to the Unitarian Universalist Church of Amherst Endowment Trust First Amended Declaration of Trust dated February 2, 1992 and contact a trustee of the Endowment Trust with any questions.

**Unitarian Universalist Church of  
Amherst Endowment Trust  
6320 Main Street  
Williamsville, New York 14221  
Phone: 716-634-3010**

**Unitarian Universalist Church of  
Amherst Endowment Trust**

FEIN: 16-6411704

Date \_\_\_\_/\_\_\_\_/\_\_\_\_

I (we) wish to donate:

\$ \_\_\_\_\_

\_\_\_\_\_ shares of \_\_\_\_\_

[\_\_]In memory of    [\_\_]In honor of

\_\_\_\_\_  
\_\_\_\_\_

Given by:

Names(s): \_\_\_\_\_

Address: \_\_\_\_\_

City/state: \_\_\_\_\_

Zip code: \_\_\_\_\_

Kindly notify:

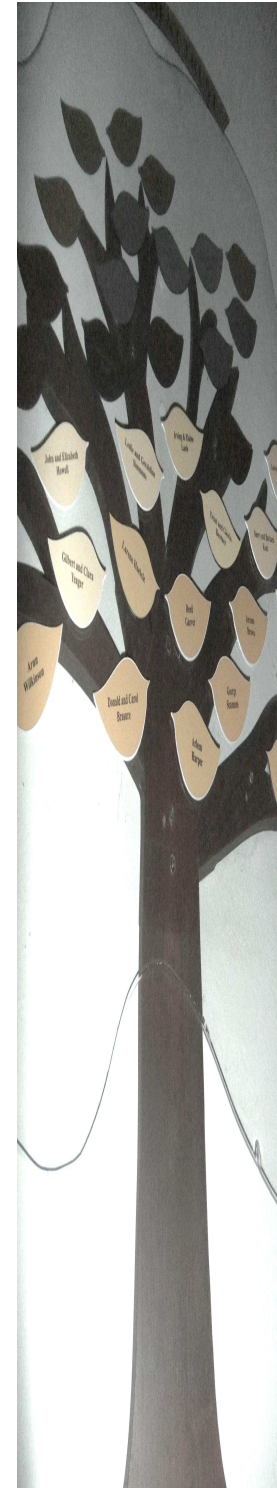
Names(s): \_\_\_\_\_

Address: \_\_\_\_\_

City/state: \_\_\_\_\_

Zip code: \_\_\_\_\_

*Gifts, donations & bequests may be  
deductible under Federal regulations.*



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