

***Yesterday.....Today.....***

***Unitarian Universalist  
Fellowship of Wayne County***



***.....Tomorrow***

***Creating a Legacy***  
***Your Guide to Planned Giving***

# The Rewards of Personal Philanthropy

As we confront the challenges of the future, we know that the generosity of those who assist us will make all the difference in our success. That is why we seek your support.

We also want to make sure that you benefit from making a gift to the Unitarian Universalist Fellowship of Wayne County. In addition to making a difference in the lives of others, the gift plans can improve your financial and tax situation – often right away. A well planned gift can reduce or possibly eliminate long term capital gains taxes, provide current income tax deductions, reduce possible estate and gift taxes, or even increase your income.

This booklet allows you to explore opportunities that combine your philanthropic giving with your financial needs and tax-planning strategies. Through creative gift planning you can secure your own financial future, as well as ours.

To design a gift that benefits the people and organizations you care about most, we recommend that you obtain the professional counsel of an attorney who specializes in estate planning. We can work with your advisors to help you plan for tomorrow and receive maximum benefit today.



## Memorial Plaque

### CELEBRATING THOSE WHO SUPPORT OUR FUTURE

Donors who make financial or estate gifts through wills, trusts and other planned gifts will be recognized for their dedication to our future and programs. Recognition will include adding their names to a plaque in the lobby.

Naming the Fellowship as a beneficiary, will give you the satisfaction of knowing that you are continuing our tradition by helping to ensure the future strength of the UUFWC through your generous support.

If you have already named us as the beneficiary of a planned gift, Please contact us today at 330-262-9194.

The information in this publication is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. Figures cited in examples are for hypothetical purposes only and are subject to change. References to estate and income taxes include federal taxes only. State income/estate taxes or state law may impact your results.



# Compare Your Options



## USE THIS CHART



To identify the gift that best fits your financial and charitable goals

	Impact on the UUFWC		Tax Benefits			Additional Benefits	
	Immediate Impact	Impact After your Lifetime	Immediate Income Tax Benefits	Future Income Tax Benefits	Capital Gains Tax Benefits	Pays you Income	Comments
Outright Gift of Cash	✓		✓				Support our members and programs in the easiest way.
Personal Properties and Securities	✓		✓		✓		Make a significant gift today without adversely affecting your cash flow.
Gift of Life Insurance	✓		✓	✓			Make a larger gift than you thought possible.
Gift of Real Estate	✓		✓		✓		Improve your cash flow by not having to pay real estate taxes, maintenance and insurance.
Charitable Lead Trust	✓						Support fellowship now and provide for your loved ones in the future.
Will or Trust		✓					Make a flexible gift.
Gift of Retirement Plan		✓		✓			Allow less heavily taxed assets to be passed to loved ones.
Charitable Remainder		✓	✓		✓	✓	Use appreciated assets to maximize your benefits.
Charitable Gift Annuity		✓	✓	✓	✓	✓	Receive fixed payments for life.

# U. U. Fellowship of Wayne County

## Planned Giving Program

The planned giving program at the Unitarian Universalist Fellowship of Wayne County encourages thoughtful gifts to build our endowment to support programs and outreach.

### Funding Our Heritage

The Unitarian Universalist Fellowship of Wayne County's financial stability is supported by three venues of giving:

1. The Annual Stewardship drive: when we ask all church members to renew their commitment to the church each year, by making a pledge.
2. Capital Campaign: held at regular intervals to support building renovations and other capital expenditures.
3. Endowment: a strong, permanent endowment provides financial stability that allows the Unitarian Universalist Fellowship of Wayne County to take advantage of special opportunities and to help the congregation through uncertain times.

## You Can Leave a Legacy

We can provide language for you to take to your attorney or tax advisor to include us in your giving plans. Please contact us at 330-262-9194 or email the office at [fellowship@uufwc.org](mailto:fellowship@uufwc.org).

Our national organization can provide additional guidance. See [www.uua.org](http://www.uua.org).

## Why is my planned gift important?

Planned gifts are often the single largest and most significant gift an individual can provide to the Unitarian Universalist Fellowship of Wayne County. Your planned gift will help ensure a vibrant liberal religious presence in Wayne and surrounding counties long into the future.

The Planned Giving Program will help support special projects, major expenses, and maintenance or improvements to the Fellowship property. This program will give our fellowship long term financial support and be a living memorial to those who have supported the fellowship. The planned giving program will also provide resources for reasons that we can't even imagine today!

## How can I participate?

Gifts may be either designated or undesignated.

Designated Gifts will be used for a specific purpose or applied to a specific fund set by the donor.

Undesignated Gifts may be used by the Unitarian Universalist Fellowship at their discretion.

