



UNITY TEMPLE

UNITARIAN UNIVERSALIST CONGREGATION

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Planned Giving

Planned Giving offers a variety of meaningful ways to support our congregation through charitable gifts. Planned gifts can be made by anybody ? young and old, working or retired ? even though your financial means may be modest. They are adaptable for your personal and financial circumstances and needs. These gifts are made today, but they support the future needs of your congregation and Unitarian Universalism.

Advantages of Planned Giving

A planned gift can be the most significant gift you can make to your congregation. It provides a flexible means of future support to your congregation which you put in place today. You can enjoy the satisfaction of giving something today which provides its benefit in the future.

Some planned gifts provide immediate income tax advantages and possible future savings on estate taxes. Certain gifts provide income to yourself and a family member over time while supporting the Congregation in the future. Planned gift opportunities offer flexible ways of giving as well as income tax and estate tax savings, depending on the type of gift and your financial circumstances. Restrictions do apply to some types of gifts.

Gifts to Consider

GIFTS BY WILL: Bequests are simple and easy to make through your will or trust. You may consider a specific amount or a portion of any assets you do not provide to your heirs.

RETIREMENT ASSETS: IRAs, 401(k), 403(b), 457(b) and other retirement plans permit you to name UUCSS as a beneficiary or contingent beneficiary for assets remaining after your death.

LIFE INSURANCE: You can name UTUUC as a beneficiary or contingent beneficiary on your life insurance. Or you can transfer ownership of your policy to UUCSS.

CHARITABLE IRA ROLLOVERS: After age 70 1/2 you can enjoy significant tax savings by gifting some or all of your annual distributions from your IRA.

CHARITABLE GIFT ANNUITIES: Receive guaranteed income for life or a fixed term. What remains is a gift to UUCSS. The annuity is provided by Unitarian Universalist Association.

Because tax benefits vary with your specific circumstances, we advise consulting with an

attorney, accountant, and/or your financial advisor.

Please consider how you can support UTUUC with a planned gift that is suitable to your needs and charitable objectives.

You can obtain more information about planned gifts by contacting the Planned Giving Team at plannedgiving@unitytemple.org ^[1].

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Links:

[1] <mailto:plannedgiving@unitytemple.org>