

# Ways to Give to UUCB's Future

*What came to us as seed may go to the next generation as blossom, and what came to us as blossom may go to them as fruit.* - Henry Ward Beecher

## Our Endowment

Giving to our Endowment is a way to perpetuate our mission. This is a fund where the principal (the original gift amount) is held in perpetuity. The annual earnings are available to support ongoing activities that carry out our mission. This fund is thoughtfully managed, and any withdrawal is approved by the Council or the congregation. When you make a future or current gift to benefit the Endowment, it is important that you designate in your will, beneficiary form or donation that your gift be directed to the Endowment.

In most cases Legacy Gifts that are received will go into our UUCB Endowment Fund. However, the UUCB Church Council with recommendations from, and in consultation with, other relevant church leaders. The Finance Team may determine where your gift is most needed at the time it is received. If you feel strongly that your gift be directed to the Endowment Fund no matter what, or should you prefer to direct a gift to a specific church ministry or program - such as music, social action, religious exploration or faith formation - *please contact us before finalizing your will, beneficiary designation or donation.* (Restricted gifts require Council approval).

To help UUCB meet the goal of the endowment challenge campaign, please complete and deliver to UUCB the Legacy Gift Confirmation Form attached at the end of this document. [Please submit this form even if your legacy gift was done in the past.](#) On the form you can also indicate what acknowledgement you would like.

# Future Gifts

## Bequest

A bequest names UUCB as a beneficiary of your estate. This could be a bequest for a specific sum of money, or proceeds from the sale of certain property. Or, it could be a bequest of a percentage of your residual estate (what remains after payment of all your expenses and specific bequests).

**To give:** Here is suggested language to include in your will:

"I hereby give and bequeath \$\_\_\_\_\_ [or \_\_\_\_\_% of my residual estate] to the Unitarian Universalist Church of Belfast, 37 Miller Street, Belfast, ME 04915, Federal Tax ID: 01-0502627."

## Beneficiary Designation

You can name UUCB as a beneficiary of your retirement account, savings account, life insurance, or annuity. This may also help avoid estate and capital gain taxes.\*

**To give:** You will need to contact the administrator of your account or plan to obtain and complete a change of beneficiary form using the following information:

Unitarian Universalist Church of Belfast, 37 Miller Street, Belfast, ME 04915  
Federal Tax ID: 01-0502627.

*\* With any tax-advantaged gift, it is wise to consult your tax advisor.*

## Current Gifts

You can also choose to give your Legacy Gift now rather than waiting for your executor or personal representative to do it. Current gifts from your estate will also count toward our goals in this Legacy Giving Campaign.

## Qualified Charitable Distribution

UUCB is a 501(c)(3) nonprofit that can receive Qualified Charitable Distributions (QCDs) from your retirement account.

- You must be 70½ or older
- You can give up to \$100,000 per year from your Traditional Retirement.
- Every dollar counts towards your required minimum IRA distribution (RMD).\*

**To give:** Instruct your IRA custodian to send a specific dollar amount to:

Unitarian Universalist Church of Belfast, 37 Miller Street, Belfast, ME 04915  
Federal Tax ID: 01-0502627.

*\* With any tax-advantaged gift, it is wise to consult your tax advisor.*

## Appreciated Securities

Donating securities is a doubly smart way to contribute to UUCB's future.

- When you donate *appreciated* stock, you avoid capital gain tax that would be due if shares were sold.
- If you itemize deductions, you may claim a tax deduction for the full fair market value of the stock at the time of the gift, up to 30% of your adjusted gross income. (To qualify, the securities must have been held for a minimum of one year.) \*

**To give:** Contact UUCB with the name of the security and the number of shares being transferred. UUCB will provide details about its brokerage account that will handle the transaction.

*\* With any tax-advantaged gift, it is wise to consult your tax advisor.*

## Real or Tangible Property

Direct contributions of real estate and personal possessions towards our endowment can also help secure our future. You may wish to consider donating art, jewelry, musical instruments, furniture, vehicles, maybe a yacht or three. 😊

**To give:** Please contact us first. *Donations of property will need approval of the UUCB Council before acceptance.*

## Cash

Cash is always welcome! Aside from monthly giving, which allows UUCB to budget for sustained activities year-round, a gift of cash can help to build UUCB's endowment.

**To give:** Establish an online Breeze account to manage payments electronically (<https://app.breezechms.com/signup>). On the "Give a Gift" page, from the drop-down menu select "Give to Endowment Fund." Contact us if you need help.

## Anonymous Giving

Normally, gifts are known to the church administration and finance committees. On the Confirmation Form you may indicate whether you give permission to acknowledge your gift to the congregation. If you do not want any of these individuals to know your identity - either until your death or permanently - you may wish to investigate the Umbrella Giving Program of the Unitarian Universalist Association (UUA). You can find information here <https://www.uua.org/giving/umbrella> about making a current gift anonymously through UUA's Umbrella Giving Program. Designating a percentage to the UUA helps defray the expense of their invaluable services.

### **To give a current anonymous gift:**

Contact: Unitarian Universalist Association, Att'n Gift Processing, 24 Farnsworth Street, Boston, MA 02210-1409, or email [giftinfo@uua.org](mailto:giftinfo@uua.org).

### **To give a future anonymous gift:**

Contact: Unitarian Universalist Association, Att'n Legacy Gifts Office, 24 Farnsworth Street, Boston, MA 02210-1409, or email [legacy@uua.org](mailto:legacy@uua.org).

## Contact Information

Rev. Amy Fiorilli  
(207) 338-4482  
[office.uubelfast@gmail.com](mailto:office.uubelfast@gmail.com)

OR

Cliff Rugg, Legacy Chair  
(617) 744-1765  
[cliffugg@gmail.com](mailto:cliffugg@gmail.com)

# Confirmation of a Legacy Gift

We are most grateful for your commitment to UUCB and for your intention to make an Endowment Gift to this church. For your gift to qualify for 10% in matching funds, complete this confidential form and return it to UUCB.

## Donor(s) Personal Information

Name(s) \_\_\_\_\_

Address \_\_\_\_\_  
 \_\_\_\_\_

Preferred phone \_\_\_\_\_

Email Address \_\_\_\_\_

## Details of Gift

Type	Specify any details	Approximate Value
Bequest from Estate	_____	\$ _____
Beneficiary Designation		
<ul style="list-style-type: none"> <li>● Retirement account</li> </ul>	_____	\$ _____
<ul style="list-style-type: none"> <li>● Savings account</li> </ul>	_____	\$ _____
<ul style="list-style-type: none"> <li>● Life insurance</li> </ul>	_____	\$ _____
<ul style="list-style-type: none"> <li>● Annuity</li> </ul>	_____	\$ _____
<ul style="list-style-type: none"> <li>● Other</li> </ul>	_____	\$ _____
Current Gift		
<ul style="list-style-type: none"> <li>● QCD</li> </ul>	_____	\$ _____
<ul style="list-style-type: none"> <li>● Appreciated securities</li> </ul>	_____	\$ _____
<ul style="list-style-type: none"> <li>● Cash</li> </ul>	_____	\$ _____
<ul style="list-style-type: none"> <li>● Real estate</li> </ul>	_____	\$ _____
<ul style="list-style-type: none"> <li>● Tangible personal property</li> </ul>	_____	\$ _____
<ul style="list-style-type: none"> <li>● Other</li> </ul>	_____	\$ _____

## Acknowledgment

UUCB recognizes and celebrates those who include the church in their giving and estate plans. If you prefer, you may choose to remain anonymous for recognition. (Financial information is never published). Please check one:

I/We are willing to be publicly acknowledged, such as listing my/our name(s) in a church publication, for church use only.

I/We prefer to remain anonymous (to the congregation).

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

## Contact Information

Rev. Amy Fiorilli  
(207) 338-4482  
[office.uubelfast@gmail.com](mailto:office.uubelfast@gmail.com)

OR

Cliff Rugg, Legacy Chair  
(617) 744-1765  
[cliffugg@gmail.com](mailto:cliffugg@gmail.com)

Please deliver completed form to UUCB (unless your gift is through UUA's Umbrella Giving Program):

Unitarian Universalist Church of Belfast  
37 Miller Street  
Belfast, ME 04915

If you are willing, kindly attach any relevant documentation. (In the case of a will, that would be an abstract or the relevant selection.)