

## **MEMORIAL OBILISK**

The UUCG Memorial Garden column contains the names of current members or former members who have been memorialized through a gift to the Endowment Fund. The current donation level required for inclusion on the obelisk is \$300.

## **MEMORIAL PLAQUE**

The UUCGEF memorial plaque contains the names of people who have been honored or memorialized through gifts to the Endowment Fund. The plaque is on permanent display in the hallway at UUCG. Current donation levels required for inclusion on the plaque are :

Memorial \$250.00

Bequest \$500.00

Donation \$500.00

### **Your Gift Now – for the Future!**

Gifts to the Endowment Fund are a great way to strengthen the long-term growth of UUCG. Just fill in the information on the reverse side, detach the section and mail it with your donation. Or put it in the EF mailbox in the UUCG office.

### **Additional Information**

If you would like additional information on how to give a memorial or honorary gift, or to include UUCGEF in your will, life insurance or trust, please contact a member of the UUCGEF Board., or the UUCG Finance Committee



**UUCG Endowment Fund, Inc.**

12 Bethesda Church Road  
Lawrenceville, GA 30044-4236

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# **FUNDING OUR FUTURE**

**“... To guarantee a continuing strong Unitarian Universalist presence in Gwinnett County, we seek to establish a solid foundation of financial security through generous funding of the short-term and long-term needs of our congregation.”**

**Unitarian Universalist  
Congregation  
Of Gwinnett  
Endowment Fund**

# FOUNDED IN 1996

We established The Unitarian Universalist Congregation of Gwinnett Endowment Fund, Inc. (UUCGEF) as a separate entity to provide focused management of funds raised for our long-term needs. The UUCGEF is a tax-exempt, non-profit corporation, organized under the laws of the State of Georgia and charged with receiving and investing funds and property to create a robust trust fund that will grow over the years and benefit many UU generations to come.

## GIFT OPPORTUNITIES

We realize that the circumstances of every member and friend are unique, so we want to make you aware of the many alternative ways in which you can contribute to the Endowment Fund, both now and in the future.

Important factors in making a planned gift include maximizing personal benefits, while minimizing after-tax cost. Here are some examples of ways that you can contribute to the UUCGEF that will help strengthen the future growth of the congregation.

## CASH DONATIONS

Because of the charitable deduction, the net cost to you will be lower than the face value of your gift. If you wish, your gift can be designated to honor or memorialize another person or to commemorate special occasions, such as anniversaries or birthdays.

## WILLS AND LIFE INSURANCE

After ensuring that your family is adequately provided for, simply revise your will or your insurance beneficiaries to include a bequest of a specific amount or percentage to the Endowment Fund.

## GIFTS OF APPRECIATED PROPERTY

With careful planning, charitable gifts of certain types of assets, such as appreciated long-term capital gains securities, and real estate, can provide even greater tax benefits to you than a gift of equivalent value in cash.

## CHARITABLE REMAINDER TRUST

The charitable remainder trust is similar to other types of trusts, except that it has a charitable beneficiary. In this case, you transfer property irrevocably to a trust and specify how the trust income and principal are to be distributed. You may create the trust to become effective during your life or upon your death. Until the remainder interest is conferred to the Endowment Fund, you may continue to receive the income.

## CHARITABLE LEAD TRUST

The charitable lead trust is the reverse of the charitable remainder trust in that it provides for the gift of an income interest from the property to the Endowment Fund for a term of years—after which the property either reverts to you or passes to a non-charitable beneficiary designated by you.

## ANNUITY TRUST

An annuity trust can provide for payment to the UUCGEF in a fixed annual amount of at least 5% of the initial fair market value of the gift in trust.

## NOTICE

This brochure is provided to illustrate generic examples only and the information herein may not apply to everyone. You should always consult your financial and legal advisors before making any changes to your will, insurance, or any trusts.

## CONTRIBUTION/INFORMATION

Please make your check payable to:  
**UUCG Endowment Fund, Inc.**

- I/We are making a donation to the UUCGEF with the enclosed check.
- I/We are making a donation to the UUCGEF in honor of :  
\_\_\_\_\_
- I/We are making a donation to the UUCGEF in memory of :  
\_\_\_\_\_
- I am making a \$\_\_\_\_\_ donation as a Birthday Club Member\* in honor of my birthday.
- I/We have included the UUCGEF in my/our will(s) or life insurance.
- Please contact me about making a donation to the UUCGEF.

Please Print – Name(s)

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\* Birthday Club members donate \$1 for each year of their life.