

## Make a Planned Gift and become a member of the Legacy Circle

The Boulder Valley Unitarian Universalist Fellowship has created the Legacy Circle to recognize, honor, and thank the generous individuals who have made or who have arranged to make a lasting contribution to BVUUF. Members of the Legacy Circle are honored annually at our *Generous Givers Luncheon*.

## Bringing Love and Reason to Life, Building a Just and Compassionate World



Photograph by Janet Meyer



## Planned Giving

Learn how you can:

- Share the BVUUF community with our children and grandchildren
- Grow the BVUUF vision and mission into the wider world for years to come
- Ensure that BVUUF will continue as a spiritual home for future generations



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Fellowship

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# Planned Giving FAQ\*

\*Frequently Asked Questions

## Q: What is Planned Giving?

A Planned Gift to BVUUF is a gift you make to BVUUF as a part of your overall estate plan. Thus a Planned Gift is one that comes into effect upon your passing. A Planned Gift supports BVUUF's mission and vision into the future. Your Planned Gift is made in addition to your annual pledge which supports the Fellowship's day-to-day operations.

## Q: How do I make a Planned Gift?

There are many ways to make a Planned Gift to the Fellowship. For example, you can make a bequest in your will, you can name BVUUF as a beneficiary of your insurance policy or retirement fund, you can create a gift annuity, or you can create a charitable trust.

In addition, the Unitarian Universalist Association (UUA) administers two programs: the **Pooled Income Fund** and the **Charitable Gift Annuity Fund**. You can invest funds with either of these programs and receive an income during your lifetime. The funds remaining upon your passing are donated to UUA sanctioned charitable organizations that you designate. These organizations may include BVUUF.

## Q: Who should consider making a Planned Gift?

Everyone! A Planned Gift is a statement of your belief in the Fellowship and its vision. Any gift, regardless of its size, is welcome as an expression of your commitment to the Fellowship.

## Q: Can I specify how my Planned Gift is to be used?

You can make a gift to the Legacy Fund or to the Endowment Fund which allows the Fellowship to determine how the gift will be used. Such gifts are preferred because they enable the Fellowship to respond to the future with greater flexibility. You can also make a specific bequest which is earmarked for a special purpose, such as music, religious education, or social justice. BVUUF welcomes such gifts when their purpose aligns with the vision and mission of the Fellowship.

## Q: What is the difference between the Legacy and Endowment Funds?

The Legacy Fund allows any amount of the principal to be spent. The Endowment Fund seeks to preserve principal and has annual spending limits among other restrictions.

## Q: I would like to make a Planned Gift. How do I start?

The BVUUF Planned Giving Committee requests that you complete a Planned Gift Form available online or from the office. All information on this form is kept in confidence and serves primarily to inform the committee of your gift. This form also establishes your membership in the **Legacy Circle**, the BVUUF society created to honor the generosity of members who make Planned Gifts.

## Q: Where can I get more information?

The Planned Giving Committee is happy to answer any questions you may have. In addition, a packet of information is available online or from a committee member. The information packet contains detailed information on the UUA funds mentioned above. It also contains information necessary to name BVUUF in a will or to name BVUUF as a beneficiary of insurance policies and retirement plans.

Please contact the Planned Giving Committee through the BVUUF office at [303-655-4280](tel:303-655-4280) or via email at [PlannedGiving@BVUUF.org](mailto:PlannedGiving@BVUUF.org) to receive additional information or to arrange a meeting with a Planned Giving Committee member.