

First UU Church of Indiana's Legacy

The planned giving program at the First Unitarian Universalist Church of Indiana encourages thoughtful gifts to build an endowment supporting our preservation.

FUNDING OUR LEGACY

Our church is funded in different ways; through legacy endowment gifts, the annual stewardship campaign, and capital campaign gifts.

1. **Endowment**—a strong, permanent endowment provides financial stability that will ensure the First UU Church of Indiana will have a future presence in the Indiana community.
2. **Annual Stewardship Campaign**— an annual canvass of members and friends whose pledges support the Church's ministries and operations.
3. **Capital Campaign**— an infrequent pledge drive designated towards expansion and maintenance of our physical assets such as the roof, major building projects, or the building itself.

GIFT POSSIBILITIES

- **A Bequest**— the simplest of planned gifts. A direction in your will or trust for a gift to the First Unitarian Universalist Church of Indiana; this can be a specific amount or a percentage of what remains after providing for your heirs.
- **Life Insurance**— name the First Unitarian Universalist Church of Indiana as an owner or beneficiary of a life insurance policy.
- **Life-Estate Agreement**— transfer title of a residence to the First Unitarian Universalist Church of Indiana while retaining use of the real estate for life.
- **Gift Annuity**— a gift of appreciated stock or other property, of which you or other beneficiaries receive fixed annual payments. Payment is based on the age of the beneficiaries at the time of the gift. In general, the donor receives an income tax deduction now and avoids capital gains tax on the sale of the property.
- **Charitable Remainder Trust**— a gift paying income to you or to your named beneficiaries.
- **Retirement Plan Assets**— name the First Unitarian Universalist Church of Indiana as a beneficiary of an IRA, 401(k), 403(b), profit sharing or other retirement plan. The donor may receive an income-tax deduction now and avoid estate taxes later.
- **Contingency Planning**— for those who have significant estate commitments for family or other reasons may consider a "contingent bequest" that would address your First Unitarian Universalist Church of Indiana priority should all other beneficiaries pre-decease. Virtually every member can provide a contingent clause while maintain commitments for young family members or elderly parents.

Would you like to discuss your participation in the Endowment Legacy Program?

Our Endowment Committee members are available to answer questions you may have about the First UU Church's planned-giving program. We can discuss your legacy gift in a confidential setting. If you would like to meet with an Endowment Committee member, please contact the Church Office to set up an appointment.