

WAKE NOW OUR VISION

COLLABORATIVE CAMPAIGN

Legacy Challenge

**We are Unitarian Universalists.
Together, we can change the world.**

Please complete, sign, and return this form with your supporting documentation to:
Laura Randall, Legacy Campaign Director | 24 Farnsworth St. | Boston, MA 02210-1409

Yes, I have included institutions participating in the Wake Now Our Vision (WNOV) Collaborative Campaign in my will, trust, or other deferred gift, and I want the UU entities I have named to qualify for a matching donation offered by the UU Congregation at Shelter Rock.

My/our legacy gift will be made via:

- Will Retirement assets—IRA, 401(k), 403(b)
 Living trust Charitable remainder trust
 Charitable gift annuity Other _____

- This gift is in the specific amount of \$ _____.
 My gift is stated as a percentage that will have an approximate value of \$ _____.
 My gift is specific property that will have an approximate value of \$ _____.
 I do not know the value of my gift/prefer not to disclose my gift's value.

This planned gift to the WNOV Collaborative Campaign is not dependent on any contingency.

I am interested in learning more about making a gift in my will to the WNOV Collaborative Campaign and/or to my congregation. Please send me the complimentary brochure, *Your Guide to Legacy Giving for Unitarian Universalism*.



please turn over



My legacy gift will be divided as follows:

_____ % to the WNOV Collaborative Campaign

Gifts made to the WNOV Collaborative Campaign will be divided among the Unitarian Universalist Association, the Unitarian Universalist Service Committee, Meadville Lombard Theological School, Starr King School for the Ministry, the Unitarian Universalist Ministers Association, and the Church of the Larger Fellowship.

—OR—

_____ % to Unitarian Universalist Association (UUA)

_____ % to Unitarian Universalist Service Committee (UUSC)

_____ % to Meadville Lombard Theological School (ML)

_____ % to Starr King School for the Ministry (SKSM)

_____ % to Unitarian Universalist Ministers Association (UUMA)

_____ % to Church of the Larger Fellowship (CLF)

+ _____ % to UU Congregation: _____ located in _____

= **100%** of my legacy gift intention

Please inform the benefiting UU organizations of my legacy gift intentions.

Sample language to include a gift in your will

I give to the [Name(s) of Unitarian Universalist organization(s), location, Federal Tax ID number], [the sum of \$ _____ or _____ percent of the rest, residue, and remainder of my estate].

Sample language to support all of the Wake Now Our Vision Unitarian Universalist Collaborative Campaign partners according to the percentages specified by the campaign:

I give to the Unitarian Universalist Association, currently located at 24 Farnsworth St., Boston, MA 02210-1409, Federal Tax ID#04-210-3733, [the sum of \$ _____ or _____ percent of the rest, residue, and remainder of my estate] to be used for the Wake Now Our Vision Unitarian Universalist Collaborative Campaign.

10%

Your Gift May Be Matched

Eligible legacy gifts will qualify for a matching donation of 10% (up to \$10,000).

I wish this legacy gift to remain anonymous.

Name _____ Spouse Name (if applicable) _____

Signature _____ 2nd Signature (if applicable) _____ Date _____

Address _____ City, State, ZIP _____

Email _____ Phone _____

Please include a copy of the relevant pages of your will, trust, or beneficiary designation forms. Kindly return those pages with this form to: Laura Randall, Legacy Campaign Director | 24 Farnsworth St. | Boston, MA 02210-1409

Have a Question? Contact Laura Randall | lrandall@uua.org | (617) 948-6511

**The information presented is not offered as legal advice. You are urged to seek the advice of your tax advisor, attorney, and/or financial planner to make certain any gift you are considering fits well in your specific circumstances. Determination of final eligibility is at the discretion of the grant provider.*

For Office Planning Only
Date Received _____
Date Scanned _____
Date Entered _____