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Many Paths. One Love.



Unitarian Universalism

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# The UUA's Umbrella Giving Program



**Unitarian  
Universalist  
Congregation**

# The simple way to give to our Unitarian Universalist Congregation



As an association of congregations, our UUA can put its combined strengths to work for the benefit of all Unitarian Universalist organizations. That is why, as part of its mission to serve member congregations such as our congregation (UUC) and the wider movement, the UUA has developed a simple and creative solution called "**Umbrella Giving**".

## What is Umbrella Giving?

Umbrella Giving allows entities under the UU umbrella to receive gifts through a single donation to the Association.

## How does this work?

The Umbrella Giving Program:

1. Creates a way for you to give anonymously.
2. Gives you access to life income gift options such as charitable gift annuities and charitable trusts.
3. Allows our congregation to focus its resources on programming instead of gift administration.

4. Provides you access to and support from knowledgeable and professional staff.
5. Creates accountability for gifts with restrictions.
6. Simplifies your estate plans.
7. Leaves a lasting legacy.

## What types of gifts are eligible?

Any gift given to the UUA can be an umbrella gift. This includes outright cash and gifts of stocks and mutual funds as well as planned gifts such as bequests and gift annuities.

## What does this cost?

Nothing. Umbrella Giving is a **completely free** service supported by your contributions. The UUA encourages individuals who make an umbrella gift to designate at least 25 percent of their gift to the UUA, to help the UUA continue their work on behalf of all the UU congregations, but the final distribution of the gift is entirely up to you.

## Can I give an umbrella gift to non-UU entities?

No. The Umbrella Giving Program was established to serve the larger UU community. Umbrella gift beneficiaries must be UU Congregations, districts, theological schools, camps and conference centers, and other UU entities.

## How do I designate an umbrella gift in my will?

First, you need to consult with your professional advisor to add the following suggested language to your will:

I give to the Unitarian Universalist Association (UUA) (tax I.D. number

04-2103733), a nonprofit 501C(3) corporation, located in Boston, Massachusetts [\_\_\_\_% of my estate or the sum of \$\_\_\_\_\_ or specific asset] to be divided by the UUA consistent with any memorandum or statement of intent I may deliver to the UUA prior to my death.

Second, you send a signed letter to the UUA that describes how you want your gift to be divided. This is your *letter of intent*. The UUA will contact you when it is received by them. If at any point you want to update the beneficiaries, instead of having to update your will again, you simply send the UUA an updated *letter of intent*.

## Will the beneficiaries be notified?

The decision is yours to make. You can choose to have the UUA keep the gift confidential, notify the beneficiary of your umbrella gift, or notify the beneficiary that an anonymous umbrella gift has been made.

## How quickly are the funds distributed?

Once the UUA receives funds from a stock gift, estate, trust, or other vehicle it will normally process and distribute the funds, according to your intentions within two business weeks.

The UUA's resources and trained professional staff are there to assist you in making one gift that will ultimately help our Unitarian Universalist Congregation here in Blacksburg, Virginia.