

FREE




PLANNED GIVING MARKETING RESOURCES

Interested in promoting Planned Giving within your congregation?

The Association's Office of Legacy gifts has free resources for your congregation's program. These resources are available online and in print. Send or fax in your order or visit www.uua.org/giving/ for more details.

Popular Marketing Resources

available in print and online

-  **Pathway to a Legacy Booklet:** Contains information on 18 different planned gift arrangements - a great introduction to charitable estate and gift planning.
-  **Ways of Giving Handouts:** In-depth information about the following planned gift arrangements.
 - Charitable Bequests: Use Your Will to Give To Unitarian Universalism
 - The UUA Charitable Gift Annuity: A Legacy of Hope
 - The Pooled Income Fund: Fund a Legacy
 - Charitable Remainder Trusts
-  **Umbrella Giving: Many Gifts, One Creative Solution!:** Information on Umbrella Giving and how it can work for you.


Specific In-depth 20 page Booklets

only available in print and in limited quantities

- **Giving Through Life Income Plans:** Review the process of deferred gift planning with emphasis on gift plans that provide an income for life or a term of years. Examples show approaches to solving typical estate planning dilemmas. An all-purpose booklet with many uses.
- **Giving Through Charitable Remainder Trusts:** This booklet describes the benefits of charitable remainder unitrusts and annuity trusts in a clear and understandable manner. The emphasis is on what these trusts can accomplish for your donors, not on simply how they do it. Includes citations to guide advisors in the creation of charitable remainder trusts.
- **Giving Through Charitable Lead Trusts:** With today's relatively low interest rates, lead trusts yield especially attractive tax benefits for many donors. Acquaint prospects and their advisors with this versatile but perhaps unfamiliar planning tool, attractive for generating a major charitable gift while having property ultimately returned to the donor or his or her heirs.
- **Better Estate Planning:** This booklet begins with "What is estate planning?" and goes on to introduce popular planning tools and to describe ways charitable giving can complement retirement and estate plans.
- **How to Make a Will That Works:** This popular booklet features answers to 36 questions that stress the importance of a will. Charitable bequests are introduced at appropriate points in a low-key manner. An ideal follow-up booklet for a bequest awareness program or for other general purposes.
- **Giving Through Retirement Plans:** The benefits of using retirement plan assets for charitable bequests and instructions on how to do it.
- **Giving Through Life Insurance:** A review of ways to use life insurance to make charitable gifts, both current and deferred. Assignments of benefits, outright gifts, and the uses of insurance to fund or guarantee pledges are discussed, along with ways life insurance may replace other assets used to make charitable gifts.
- **Giving Securities:** This booklet addresses gifts of property in general with emphasis on gifts of stocks, bonds, mutual funds, and other securities—the most common forms for non-cash gifts. Major donors and prospects will appreciate the examples and guidance about how to make gifts of securities.
- **Giving Real Estate:** A companion piece to "Giving Securities," this booklet emphasizes the many gift opportunities open to those who own highly appreciated real property. Donors in areas with rapidly increasing real estate values or who hold the majority of their wealth in real property will benefit from "Giving Real Estate."

Congregational Guides

available in print and online

-  **Planned Giving - A Guide for UU Congregations:** This guide will help you plan and conduct your planned giving program.



UNITARIAN UNIVERSALIST
ASSOCIATION OF CONGREGATIONS








PLANNED GIVING MARKETING RESOURCES ORDER FORM

Name: _____

Shipping Address: _____

Name of Congregation: _____

Phone / Email: _____

Qty.		Brochure <i>(descriptions on reverse)</i>
		Popular Marketing Resources:
		Pathway to a Legacy Booklet
		Charitable Bequests: Use Your Will to Give To Unitarian Universalism
		The UUA Charitable Gift Annuity: A Legacy of Hope
		The Pooled Income Fund: Fund a Legacy
		Charitable Remainder Trusts
		Umbrella Giving
		Specific In-depth 20 page Booklets:
		Giving Through Life Income Plans
		Giving Through Charitable Remainder Trusts
		Giving Thought Charitable Lead Trusts
		Better Estate Planning
		How to Make a Will That Works
		Giving Through Retirement Plans
		Giving Through Life Insurance
		Giving Securities
		Giving Real Estate
		Congregational Resources:
		Planned Giving : A Guide for Unitarian Universalist Congregations


Please send or fax your order to:

**Unitarian Universalist Association
Office of Legacy Gifts
25 Beacon Street
Boston, MA 02108-2800**

tel (888) 792-5885 | fax (617) 725-4979
giftplans@uua.org

Please allow 10 working days for delivery.

Thank you for your order!

 = PDF version available at
www.uua.org/giving/

These resources are available to Unitarian Universalist Congregations at no cost