

If you like the idea of leaving a gift to UUFRC that lasts long beyond your lifetime, you might think about a bequest or charitable trust. Even if your estate isn't large, or you have other people in your life you want to provide for, it's possible to make a bequest or other planned gift that will mean a great deal to the future strength and stability of UUFRC.



Here are some of the options you might want to consider:

General bequest. You can give your entire estate to the Fellowship.

Specific Bequest. You can give a percentage, a specific asset, or a specific amount, to the Fellowship. Certain kinds of assets donated this way may result in tax savings.

Residuary Bequest. This just means that you can transfer the remainder of your estate to the Fellowship after provisions for your other heirs have been met.

Contingent Bequest. If one of your heirs predeceases you, or disclaims the inheritance, you can make the Fellowship "second in line."

Testamentary Charitable Remainder Trust. This sounds complicated, but its concept is actually pretty simple. With your lawyer, you write a Trust document that says which assets are designated to which heirs, and these people receive the income of those specified amounts during their lifetimes. When the last heir dies, the assets revert to your charity. It's a "now-and-later" kind of arrangement.

Beneficiary Designation. You can name UUFRC as the beneficiary of certain assets you hold, that you don't plan to leave to someone else: a retirement plan, an IRA account, or a life insurance policy. Sometimes, people who are doing estate planning encounter assets like these that they have forgotten they own, and use them to make charitable bequests after distributing the rest of the estate to children or other heirs. Remember, changing beneficiaries is among the simplest and least expensive ways to direct assets. It doesn't involve a lawyer, and can often be done on-line.



The UUA has offered these examples of language for drafting your will. They suggest you ***share this with your attorney*** as you write your will or codicil.

General Bequest: I give all my real and personal property to the Unitarian Universalist Fellowship of Redwood City, a California charitable corporation located at 2124 Brewster Avenue, Redwood City, CA 94062, for its general purposes.

Specific Bequest: I give _____ (amount, description of the property, or percentage of the estate) to the Unitarian Universalist Fellowship of Redwood City, a California charitable corporation located at 2124 Brewster Avenue, Redwood City, CA 94062, for its general purposes.

Residuary Bequest: I give all (or _____ percent) of my remaining assets of any kind to the Unitarian Universalist Fellowship of Redwood City, a California charitable corporation located at 2124 Brewster Avenue, Redwood City, CA 94062, for its general purposes.

Charitable Remainder Trusts

There are different forms for this, but Charitable Remainder Trusts all combine doing good for your charitable cause with achieving your financial planning goals, including a secure income in your later life. With the help of your attorney or financial planner, you can create a Charitable Remainder Trust that creates an ongoing payout for you (or somebody else you designate) and names UUFRC as the beneficiary of the principal.

Here are some of the indicators that a Charitable Remainder Trust might be right for you:

- You are in a position to irrevocably transfer cash, securities or real property in exchange for a life income
- You would like to receive a regular income for life or provide for someone else, such as a member of your family.
- You are interested in current tax benefits that accompany such a gift.
- You like the idea of making a gift that will provide benefits to you and your loved ones for life and will benefit UUFRC in the future.



What Do I Do Next?

If you think a planned gift to UUFRC might be right for you, please talk to your attorney or financial planner about what will be most beneficial to you. If you need recommendations for an estate planning professional, call the UUFRC office. We've compiled a list of people that others in our community have used and are willing to recommend.

If you'd like more information, please contact the UUFRC office at (650) 365-6913 or office@uufrc.org.

Don't Forget: Planned Gifts Do Not Replace Current Gifts!

To stay strong and vibrant, UUFRC must rely on its yearly Pledge Drive income. Please view any planned gift to the Fellowship as an addition to your current giving. Your provision for UUFRC through your estate will have impact for future generations of our Fellowship.

Planned Giving at UUFRC



Even a small bequest
can leave a big impact.