

SEDONA UNITARIAN UNIVERSALIST FELLOWSHIP (SUUF)

Legacy Gift Program Overview

BACKGROUND

A bequest, also known as a legacy gift, is a gift from your estate—a transfer of cash, securities, or other property made through your estate plans. You can make a bequest to SUUF by including language in your will or living trust leaving a portion of your estate to SUUF, or by designating SUUF as a beneficiary of your retirement account or life insurance policy.

Remembering SUUF with a legacy gift from your estate will help sustain and strengthen Unitarian Universalism and SUUF in years to come. Some of the advantages of creating a bequest include:

- A bequest costs nothing now, yet gives you the satisfaction of knowing you have provided for SUUF in the future
- You retain control of and use of your assets during your lifetime
- You may modify your bequest if your circumstances change
- Gifts to SUUF from your estate are exempt from federal estate taxes.

MAKING A BEQUEST

A legacy gift to SUUF can be made for a specific amount, for a percentage of your estate, or for all or a portion of what is left after you have made bequests to your family. To make a gift to SUUF from your estate, you must either sign a new will or living trust instrument, add a codicil to your present will, or make an amendment to your present trust instrument.

Alternatively, you can designate SUUF as a beneficiary of a retirement plan or life insurance policy. To do so, contact the plan administrator or life insurance company and complete the appropriate beneficiary designation form.

Those considering a legacy gift or bequest should always consult their own legal and tax advisors.

SEDONA UNITARIAN UNIVERSALIST FELLOWSHIP (SUUF) Legacy Gift

It is our giving that makes our dreams of SUUF a Reality!

A gift in your will to Sedona Unitarian Universalist Fellowship is a wonderful way to build a legacy. This future gift is an extension of your current commitment and support – one that will ensure a secure and bright future for SUUF.

Contact Information

First Name: _____ Last Name: _____

Joint Donor _____ Last Name: _____

Primary E-mail: _____ Confirm: _____

Phone Number: _____ Cellphone: _____

Home Address: _____

City: _____ State: _____ Zip Code: _____

2nd Home Address: _____

City: _____ State: _____ Zip Code: _____

Bequest Information

Details of your bequest will help us plan for the future. This information is strictly confidential.

I/We have already included Sedona Unitarian Universalist Fellowship in my/our will(s)
Yes___ No___

I/We intend to include Sedona Unitarian Universalist Fellowship in my/our will(s).
Yes___ No___

I/We have named Sedona Unitarian Universalist Fellowship as a beneficiary in one or more:

Will ___ IRA/ Pension___ Other Retirement Account ___ Trust ___

Donor-Advised Fund___ Life Insurance Policy ___

If other, please specify_____

Approximate amount:_____

Is this a percentage of your estate? _____ If so, how much? _____

Thank you for considering a bequest to SUUF as a part of your legacy. Please return this form to our SUUF Treasurer.