



Planned Giving Designation Form (revised 5/1/22)

Thank you for considering a long-term gift for the future of **Neighborhood Unitarian Universalist Church of Pasadena**. By making a bequest to any fund, or alternatively a gift during your life to a permanent endowment, you automatically become a member of the Neighborhood Legacy Society.

Why are you being asked to complete this form? You previously expressed interest in helping ensure the future of **Neighborhood Unitarian Universalist Church** through either a significant gift during your lifetime (whatever that means to you) or through your estate. This means your intent needs to be documented to ensure that your wishes for the use of your gift are honored. This form is meant to document your intent to execute a planned gift in favor of Neighborhood Church. If you are not yet a member of the Legacy Society but wish to be listed as a member because you have made such a provision for Neighborhood, please check here. If you are uncertain and just wish to learn more about the Legacy Society please check here.

Bequest gifts often take the form of a restricted gift, usually a permanent endowment, however, by law we cannot assume that is your intent or which purpose you might choose to support. Without documentation of your expressed intent, we must consider your gift unrestricted and fully expendable.

Undocumented gifts will be subject to the Board's recommendation for use and reevaluation from time to time. The Board has, however, committed to set aside a portion of any unanticipated (therefore unrestricted) gift to be invested and managed as quasi-endowment to honor the gift's legacy nature. This means that we will endeavor to spend only income from the investments of such funds, however, a future Board could vote to expend such funds to meet the needs of the church.

While the Board's recommendation may be to use such funds to support a particular project or purpose it cannot convert an unrestricted gift into a permanently restricted gift. Gifts of any amount are welcome and contribute to the future of Neighborhood. Donations can be made to an existing endowed fund, a restricted purpose or as an unrestricted gift in support of the Church's general operations. A new endowed fund can be established with a minimum contribution of \$20,000.

If you would like to discuss gift options available or receive a copy of the Neighborhood Unitarian Universalist Church Endowment and Gift Acceptance Policies please contact Andy Eaton, Treasurer or Tom Petersmeyer, Chair of the Planned Giving Committee.

To help us honor and facilitate your planned gift wishes, please indicate below which option(s) you want and the percentage allocation for each. Please discuss with your attorney whether to frame your gift in specific dollars or calculated as a percentage of your estate.

Name(s)			
Street Address:			
City	State	Zip Code	
Telephone: Home	Telephone Cell:		
Email(s):			

While we understand that plans may change, it is my/our intent to provide a gift of \$ _____ OR % _____ of my/our estate (if amount is unknown) to **Neighborhood Unitarian Universalist Church** in my/our estate plans, which may also include lifetime gifts. This Planned Gift(s) is to be used for the following purpose(s):

Neighborhood Church has several endowments which can receive contributions.

-Permanently Restricted Endowments-

General Endowment - Earnings generated from this endowment support the church's general operations and are reflected in the annual operating budget.

\$ _____ OR % _____

Jordan Ministerial Intern Endowment - Earnings generated from this endowment are used to fund ministerial intern salaries and benefits during their internship at Neighborhood Unitarian Universalist Church.

\$ _____ OR % _____

The Irving Rector Memorial Preservation Endowment--This Endowment was created in memory of Francis and Joyce Turney, and Irving and Shelby Rector, all long-term members of Neighborhood Church. The original preservation fund, now fully expended, was established by Irving and Shelby with gifts and bequests, large and small, from many members and friends of Neighborhood Church. Francis served for multiple years as Chair of the Building and Grounds Committee and Joyce served in various positions including as President of the Board from 1992-1994 and Past-President from 1994-1997. Earnings generated from this endowment support building and grounds projects at Neighborhood Church involving restoration, long term preservation, special maintenance, extraordinary major repairs, and significant landscaping, but not including new construction.

\$ _____ OR % _____

Neighborhood Unitarian Universalist Church Endowed Fund for Racial Justice -This provides support at NUUC for social justice work and musical expression on the theme of racial justice. Annual payout from the endowment will be equally divided between NUUC's social justice program and music program to promote racial justice. Uses will be determined with the involvement of associated music and social justice staff and the Neighborhood People of Color (NPOC), or a succeeding group.

\$ _____ OR % _____

-Temporarily Restricted Funds-

Gifts to the Temporarily Restricted funds are fully expendable and restricted for a specific purpose:

General Reserve-Used to fund Board authorized, irregular and extraordinary expenses only.

\$ _____ OR % _____

Maintenance Reserve -Used to fund Board authorized major maintenance, repair, refurbishment only.

\$ _____ OR % _____

Minister's Discretionary Fund -At the Minister's discretion can be used for congregational support for those in need, to augment professional expenses, continuing education, meeting expenses, staff appreciation, and community support.

\$ _____ OR % _____

Board Discretion -Entrust Board of Trustees to decide best use of funds at the time of my gift.

\$ _____ OR % _____

Other temporary purpose fund -There are multiple funds that may already exist from time to time such as 7th principle/net zero (Spalding Fund), music (Thomas Yeakle Fund), etc. You can also identify a new fund. Please indicate desired funds in comments section.

\$ _____ OR % _____

-Unrestricted Gifts-

Gifts in support of the annual operating budget or unanticipated needs as approved by the Board and Congregation. Gifts in this category will not be subject to reclassification by the Board as part of the Bequest Reserve as described in the Endowment Policy.

\$ _____ OR % _____

Total of all Gift Allocations- (Percentages Should Equal 100%)

\$ _____ OR % _____

Note: Special purpose endowments may be established with a minimum donation of \$20,000.

Neighborhood Church will work with prospective donors on the terms and conditions of other special purpose or named endowments provided they support the church's mission through its activities or functions. Examples might be endowments which generate income to augment key ministry areas such as Music, Religious Education, Social Justice/Community Outreach, or a staff programs endowment.

Please provide a description for your proposed new endowment fund:

-Note that this document will not supersede any existing legal document specifying intention.

I understand that If circumstances should arise in the future that make it illegal, impossible, or impracticable to use the gift for the purpose specified above, then the Finance Committee may submit a recommendation to the Neighborhood Unitarian Universalist Church Board of Trustees for modification of the original purpose with the use of the income from the modified fund to be for the fulfillment of objectives as near as practical to the original purpose. If, in the best judgment of the Trustees, such modification is deemed prudent, they shall submit the recommendation to the Congregation for a majority vote. In the event of such modification to a named endowment, the original name will continue to be associated with the fund. This provision cannot convert a permanently restricted gift into a temporarily restricted or unrestricted gift. And that, In the event of the dissolution of Neighborhood Church these funds would be transferred to the Unitarian Universalist Association (UUA) to be used for a purpose as similar to the original intent as possible.

Printed Name(s)	
Signature	Date
Signature	Date

