

Neighborhood Church Legacy Society

Please join us to forge a strong and sustainable foundation for our faith community through the Neighborhood Legacy Society.

The Neighborhood Legacy Society is a group of dedicated and visionary donors who have included the Neighborhood Unitarian Universalist Church of Pasadena (Neighborhood Church) in their estate planning or by donating assets during their life. Neighborhood Church is proud of its heritage of inspired donors, who together over time, have strengthened our prospects for future generations of participants in Neighborhood Church programs through their generosity and commitment to our shared values.

To join more, please review and return our [Planned Gift Designation Form](#)

“You have no idea what your legacy will be because your legacy is every life you touch”

Maya Angelou

Features and benefits of Legacy Society Membership

- Join with other leading members as stewards of our faith community’s future.
- Establish a lasting legacy that ensures the continuous development of spiritual service, compassionate work and social action
- Honor loved ones and/or create targeted streams of support
- Be annually recognized and permanently honored with the addition of your name on the Legacy Society Sculpture
- Convene with other Legacy Society members at our annual luncheon meeting and special initiatives
- Members are cordially invited to join our Planned Giving Subcommittee to advance these general efforts

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Many ways to fund a planned gift

- *Bequest from trust or will*
- *Cash or Check*
- *Grant from a Donor Advised Fund*
- *Appreciated stocks*
- *Employer's matching Gifts*
- *Whole or part beneficial interest of gift of real estate and other property (house, car, art work, business interest, etc.)*
- *Charitable IRA gift to reduce taxes from the Required Minimum Distributions (RMD) to meet pledge commitments, endowments or other purposes*
- *Whole or part beneficiary from bank or credit union accounts, investment accounts, retirement plans, or insurance policies, etc.).*
- *Gifts of intellectual Property and Royalties*

There are lots of different ways to leave your legacy at Neighborhood Church. While we can assist in answering questions about the Legacy Society and planned giving, we encourage you to consult your legal and tax advisors before making major charitable contributions. Here are our policies guiding gift planning. You can also find them under the governance section of the church website.

[Planned Gift Designation Form](#)

[Endowment Policy](#)

[Investment Policy](#)

[Gifts Acceptance Policy](#)

Features of various accessible planned gifts

Charitable Gift Annuities provide fixed lifetime payouts at a higher rate than CDs and treasuries, a tax deduction at its creation and a tax reduction with each regular distribution, among other benefits, when appreciated securities are used to fund the gift annuity. The remainder at death benefits Neighborhood Church either as an endowed legacy or other designated support.

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A **Charitable Remainder Trust** can generate either fixed annual income to you (called a charitable remainder annuity trust), or variable income based on annual distributions to you from investment in stocks, bonds or alternative investments (called a “charitable remainder unitrust”). After the donor dies, the remainder benefits Neighborhood Church, either as an endowed legacy or other designated support.

If you are 72 1/2 or older and have an IRA, every year you can make a **Qualified Charitable Distribution (QCD)** from your annual required minimum distribution (RMD). Doing so would reduce tax liability, and in some cases reduce your tax bracket. You may direct the gift to achieve a variety of goals, from meeting your annual pledge, supporting specific church programs, or contributing to, or creating an endowed fund to create a legacy that provides continual support. To make a qualified charitable distribution from RMD's, you must first contact your investment custodian for the correct forms and process. This must be done before your account custodian prepares the donation on your behalf. Please contact them about the QCD when you plan on making your required minimum distribution

How do I request a QCD?

- Communicate with your IRA's custodian (where your IRA is held) that you are interested in making a QCD(s).
- Provide the Tax ID for Neighborhood (95-1684074).
- Make the request for a QCD(s) in writing.
- Specify the dollar amount that you wish to contribute.
- Request the check be made payable to Neighborhood Church but be mailed to you.
- Tell the church what you want it to go towards (e.g. 23-24 pledge).

Other Elements in IRA-based charitable giving.

A change in taxation made during the Trump administration eliminated a major tax-related incentive for most Americans who previously benefited from itemized deductions. While simplifying tax filing by offering a more generous Standard Deduction write-off, this tax policy resulted in a substantial reduction of tax-incentivized support for most charitable organizations, reducing support for charities across the country.

The IRA QCD is thus a tax-advantaged gift strategy that further benefits those who wish to directly support Neighborhood Church while further reducing their tax liability.

If you have a **Life Insurance Policy** you no longer need, whether paid up or not, by including Neighborhood Church as the irrevocable beneficiary, the total amount of the benefit can become a major legacy gift. After naming the Neighborhood Church as beneficiary of your policy, all annual premiums you pay are tax deductible. You can also make Neighborhood Church a partial beneficiary of a Life Insurance policy or an IRA.

A look at Neighborhood Church's current endowments, restricted funds and current programs

- Permanently Restricted Endowments -

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

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

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. Earnings generated from this endowment support building and grounds restoration, long term preservation, special repairs and maintenance, significant landscaping but not new construction.

Neighborhood Unitarian Universalist Endowed Church Fund for Racial Justice -This endowment equally supports NUUC social justice work and musical expression on the theme of racial justice. Distributions are determined by associated music and social justice staff and the Neighborhood People of Color (NPOC) or a succeeding group.

The Francis and Joyce Turney Memorial Music Endowment- This fund was created in memory of Francis and Joyce Turney, long term members of Neighborhood Church and avid supporters of the music program. Investment earnings generated from this restricted endowment fund are meant to support the Music Program at Neighborhood Church including both budget support and budget augmentation.

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-Temporarily Restricted Funds-

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

Maintenance Reserve – Used to fund Board authorized major maintenance, repair and refurbishment only. This fund has required funding levels based on Neighborhood Church’s by-laws, to ensure the long-term maintenance of the building and grounds.

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.

Spalding Green Sanctuary Fund – created in memory of young James Spalding to support broad environmental projects, including Neighborhood Church’s net zero energy conservation efforts.

Lukas Pender Fund – *Created in memory of Lukas Pender, who died by suicide while still a part of Neighborhood Church’s Senior High Spiritual Exploration Program. Funds support the Senior High Group for participation in activities such as General Assembly, Convocations, and other activities.*

Esperanza Fund – *This fund provides support for the current semi-annual trips to Tijuana Mexico for building houses. Funds are mainly used to provide scholarships, but may also be used to support the Esperanza program directly.*

-Unrestricted Gifts-

A donor may also make an unrestricted gift, which the Board then allocates to either operations, reserves, or special projects at the time of gift receipt.

Donors are encouraged to create new endowments, temporary purpose funds and unrestricted gifts in accordance with Neighborhood Church’s Endowment and Gift Acceptance Policies.

“The greatness of a community is most accurately measured by the compassionate actions of its members”

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Coretta Scott King

Testimonials: Why we are building Neighborhood Church's legacy

Elizabeth Sadlon and Tres Izzard

"We came to Neighborhood in search of a values-based community for our children, and found a second home and chosen family for all of us. As parents, we're forever grateful for the spiritual exploration and grounding, deep and lasting friendships, cross-generational relationships, sexuality classes, and safe space to learn, try, grow, and lead that the church provided for our now adult daughters."



We stay active members at Neighborhood as our spiritual community where we are continuously challenged and supported as we re-energize for our work in the world. We are part of the legacy society because we want Neighborhood to be here for future generations".

Alan Freeman

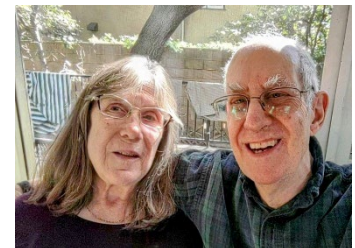


"I love liberal worship services that stress Courage, Compassion, and Connection that teach us that a goal of our liberal faith is to prepare us for sacred moments. I love a congregation that welcomes everyone who wants or needs to be here – whether for the first time or for all time. A place where we draw knowledge and inspiration from the sacred texts of other traditions as well as those we may have grown up with and still cherish. I love our liberal tradition which teaches the universal truths of love and service, of forgiving others as we forgive ourselves. I love this liberal church community and the people who have kept it going for over a hundred years".

"Kathie and I made a simple pledge that we intended to put this congregation in our end-of-life plan. And since we became Legacy Society members, we have indeed stipulated in our family trust that a percentage of our estate will be given one day to Neighborhood Church."

Andy and Barb Eaton

"When we first came to Neighborhood more than 30 years ago, we were relatively "unchurched" even though Andy had been a lifelong UU and frankly didn't do much charitable giving. After a few years at Neighborhood, we understood the long-term value of the community, from being formative for our daughter's decision to go into social work, the close friends we made, and to the commitment and actions for social justice. We realized giving back to our



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community for the future was the right thing to do. The Neighborhood Legacy Society provided a mechanism for that. When we were creating our estate plan we made sure that in addition to benefiting our children, a substantial portion of the estate would go to the endowment at Neighborhood and also the UUSC, to demonstrate our commitment to the future growth of our spiritual home and to causes we believe in. Our daughter, Lauren, met her husband Mike at DeBenville Pines and our grand-twins will soon be starting OWL at Neighborhood, so sustaining this beloved institution for at least two more generations is even more important for us now!”

Dick Smoak and Ferol Mennen

“Ferol and I met at Neighborhood Church in 1990 while participating in a sermon discussion and lunch group and continued on with a restaurant tour group in the greater Pasadena area. Our enjoyment of each other’s company ultimately led to our marriage in the church garden in 1994. We continued to be active in other social activities, social justice groups, church committees, and governance. After some years, the church became the center of our social lives and we have benefited from our relationships with the many wonderful people we have gotten to know.



We want Neighborhood UU Church to prosper as an institution so that it can continue to offer others the opportunities that we have enjoyed for so many years—wonderful friendships, spiritual growth, and a home for social justice activities. We are at a point in our lives where we can afford to gift the church to help the church live on beyond us. We think that by assisting the church in growing its membership there will be further opportunities for members to get to know one another in a more personal way.”

Cindy Stone and Dave Kronberg

“We have dedicated our working lives to historic sites and museums, arts education, environmental and community development organizations, and grantmaking philanthropy. Guided by our UU values, we have dedicated our careers promoting diversity, appreciation of the natural and built environment, and respect for all people and their creative impulses.



Now that we have found a new home in Pasadena and at Neighborhood Church, we are continuing this work through volunteering and by eventually establishing a legacy through permanently endowing this work at Neighborhood Church. We have made a planned gift to endow preservation of our historic campus and advance our net zero energy and environmental improvements. We



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also give annually to build the church's general endowment and other activities that sustain its dynamic place in our lives now and in the future."

For more information, please contact:

Treasurer (treasurer@neighborhooduu.org)

Neighborhood Unitarian Universalist Church of Pasadena

301 North Orange Grove Blvd

Pasadena, CA 91103-3540

626-449-3470