

## Why Planned Giving?

Planned Giving and Special Gifts give you the opportunity to leave a legacy for the future of this cherished community. Your contributions can help us with special needs beyond the basic annual budget, such as

- Facilities Repair Reserve
- Facilities Improvement Fund
- Leadership Training and Development
- Remembrance Funds



*If you are interested in finding out more about Planned Giving, please contact members of the Finance Committee. Thank you!*

*Planned Giving is...  
... your legacy to FUSW  
... FUSW's legacy to the world*

## The Principles and Purposes of the Unitarian Universalist Association

We covenant to affirm and promote:

- *The inherent worth and dignity of every person;*
- *Justice, equity, and compassion in human relations;*
- *Acceptance of one another and encouragement to spiritual growth in our congregations;*
- *A free and responsible search for truth and meaning;*
- *The right of conscience and the use of the democratic process within our congregations and in society at large;*
- *The goal of world community with peace, liberty and justice for all;*
- *Respect for the interdependent web of all existence of which we are a part.*

## Leaving a Legacy

### *A Guide to Planned Giving and Special Gifts*



THE FIRST UNITARIAN  
SOCIETY OF  
WESTCHESTER

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## *We have a history of generosity...*

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People give generously to the First Unitarian Society in many ways. We are a community of volunteers, offering our time and talents, in partnership with our staff, to:

- Create worship services
- Advance social justice
- Provide religious education
- Support individuals and build community
- Present inspiring music and art events
- Maintain our building and grounds

These programs enrich our lives and make a difference in the world.

Members and friends of the congregation support our work primarily through their annual pledges as well as “cash in the plate,” and we are grateful for all such contributions. However, these funds typically cover only our basic expenses.

During these challenging economic times, it is particularly difficult to accumulate savings for large-scale future projects, such as major repairs or new construction. Therefore, we will continue to plan budgets responsibly and strive to live within our means, and at the same time, we hope you will consider making FUSW a future beneficiary of your estate or giving FUSW a Special Gift.



## *What is Planned Giving?*

Planned Giving” is a term that describes financial gifts which have a future value, such as naming FUSW as a beneficiary in a will. This has no cost to the donor during life, but is generally of significant financial benefit to the Society.

### **Types of Gifts**

➤ One simple approach is to name FUSW as a beneficiary to a life insurance policy or to a retirement account. Changes such as these can often be done over the internet.

➤ One can add FUSW to the list of beneficiaries in a will. This involves a lawyer and witnesses, so it is best done along with some other desired change. These gifts will result in a lower estate tax or can be used to reduce income taxes when an estate that has taxable income is resolved. Please remember that any of these bequests can be increased, decreased or even eliminated depending on your circumstances.

➤ One can also give ownership of a paid-up (or nearly paid-up) life insurance policy to FUSW. Once done, this cannot be reversed, but the donor will get a substantial tax deduction at little or no current cost. If further premium payments are due, these are deductible in addition to the value of the policy.

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## *Giving Special Gifts*

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If you are in a position to make an extra contribution at any time in your life, your generosity will be deeply appreciated. Members have made donations (in addition to their pledges) to celebrate or honor special occasions in their lives.

*Please Note:*

FUSW will review all non-cash gifts, and may decline them if they are considered not marketable or otherwise useful.

*We are grateful for the following gifts:*

### **Special Gifts**

*Eleanor Corvini, Gil Hart, Avis Ogilvy Moore, John Murray, Ruth Murray, Sondra Slade, Martha Tauss, Annie Patton, Barbara Thompson, Anonymous*

### **Legacy Support**

*Richard and Joan Benua  
Irene Goldring  
Albert Hartzell  
Walter Stabi  
Susan Wolman*

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