

**LEGACY GIFTS COME IN ALL SHAPES AND  
SIZES AND ARE AS DIFFERENT AS THE  
PEOPLE WHO CREATE THEM...**

Your bequest or beneficiary designation is a statement of faith: Faith that the congregation and its voice for compassionate justice and religious freedom are important now and will be important long after we are gone.

Bequests and beneficiary designations are for everyone and anyone. They are sensible and simple gifts that allow you to be a Unitarian Universalist philanthropist and keep your financial options open.

- You can use a bequest in your will or living trust to give a specific dollar amount or a percentage of your estate.
- You can use a beneficiary designation to give a percentage of a retirement account, life insurance policy, bank account, donor advised fund, or annuity.

Many bequests are unrestricted, given for general purposes. These provide maximum flexibility for the congregation, as these gifts can be used where they are needed most. The congregation can put these gifts to use where they are most needed.

Some bequests are restricted to specific purposes, such as the permanent endowment, building maintenance, or other use. It is recommended that you discuss any restricted gifts with the senior minister to ensure your gift can be honored.

Sample bequest language is included in this brochure for you to use or to share with your attorney. If none suits what you have in mind, please speak with one of the ministers.

For more information or a conversation about how legacy gifts can be transformational for First UU and its future, please contact the senior minister.

*Legacy Leaders*

If you have already made a legacy gift to the congregation, thank you. We honor those who have included First UU in their estate plans as Legacy Leaders.

If you have made a legacy gift to the congregation, please let Rev. Chris Jimmerson know so that we may invite you to future Legacy Leaders events. If you prefer that your legacy giving remain anonymous, please share your gift with Rev. Chris, for church planning purposes, and we will honor your privacy.

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*Legacy Giving*

FIRST  
UNITARIAN UNIVERSALIST  
CHURCH *of* Austin

**TOGETHER  
WE NOURISH SOULS,  
TRANSFORM LIVES,  
AND DO JUSTICE  
TO BUILD THE  
BELOVED COMMUNITY.**

## MAKING A BEQUEST:

*Your legacy is a vital part of building the **Beloved Community**. Through your legacy gift you can help sustain the heart of First UU's mission to nourish the community while transforming the scope and depth with which we do justice.*

*In a world where hate and oppression make claim to religious truth, Unitarian Universalism offers love, democracy, and compassionate justice. A gift to First UU can bring you peace and joy knowing that First UU's legacy will live on through your generosity. Your gift will continue to strengthen and extend liberal religion in Austin and around the world!*

*Whether you are creating an estate plan or designating a beneficiary for your retirement or life insurance, please include a gift for **First Unitarian Universalist Church of Austin!***

If you would like to name First UU as the beneficiary of your will, trust, or estate, please use the following suggested bequest language. If you have an attorney assisting you, please share this language with them.

### UNRESTRICTED GIFT

I give to the First Unitarian Universalist Church of Austin, located in Austin, Texas, Federal Tax ID: 74-1612515, [\_\_% of my estate, or the sum of \$\_\_] for its general purposes.

### RESTRICTED GIFT

I give to the First Unitarian Universalist Church of Austin, located in Austin, Texas, Federal Tax ID: 74-1612515, [\_\_% of my estate, or the sum of \$\_\_] to be used for [stated purpose]. If at any time in the judgment of the organization's Board of Trustees it is deemed impossible or impracticable to carry out the above purpose, said trustees shall determine a purpose as near as possible to that description above.

## DESIGNATING BENEFICIARIES

If you would like to name First UU as the beneficiary of your retirement plan, IRA, life insurance policy, bank account, donor advised fund, or commercial annuity, the steps are straightforward:

- Decide what percentage or dollar amount you would like the congregation to receive;
- Contact your retirement plan administrator, insurance company, bank, or other financial institution for a change of beneficiary form;
- On the beneficiary form, add First Unitarian Universalist Church of Austin of Austin, Texas, Federal Tax ID: 74-1612515 along with the percentage or dollar amount you choose;
- Return the completed form to your plan administrator, insurance company, bank, or other financial institution.

**WE RECOMMEND THAT YOU CONSULT YOUR LEGAL AND/OR TAX PROFESSIONALS TO ASSURE THAT YOUR WISHES ARE STRUCTURED TO ACHIEVE THE OVERALL RESULT YOU ARE SEEKING.**