WHY THE ENDOWMENT?

The UUCSR Endowment provides a great opportunity to make a long-lasting contribution to a congregation whose influence and good works continue to grow year after year. Has UUCSR been an important part of your spiritual identity? It has been for this member and UUCSR Endowment donor:

“UUCSR has been at the center of my life, and I always wanted to give something back that would help ensure the well-being of the congregation. For me, leaving a bequest in my will is the perfect answer.”

If UUCSR has been important to you as well, please consider making a contribution to the Endowment. A legacy gift of any size is always significant.

IN GOOD HANDS

Formed in 1993, the UUCSR Endowment has helped shape the history of this congregation. In 2003 it played a vital role in helping us purchase the new building in downtown Santa Rosa, and in meeting the numerous challenges of creating our new spiritual home.

The Endowment is administered by the UUCSR Board of Directors, with the assistance of an Endowment Committee. A local investment firm manages the portfolio.

For more information, please contact Rev. Chris Bell, the board treasurer, or any member of the Endowment Committee.

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People photos courtesy of Patrick Craig
Tree photos courtesy of Andrew Hidas

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YOUR LEGACY ASSURED

Celebrating Life
Empowering People
Caring for One Another
Helping to Build a Better World

This inspiring vision is realized every day of the week through the services and programs offered to Unitarian Universalist Congregation of Santa Rosa members and the community. All of this important work is made possible by a dedicated staff that is supported by many volunteers and the generous contributions to the Annual Pledge Drive and other fundraising events.

Although less visible, the UUCSR Endowment also plays an important role in the realization of this vision by providing financial stability and growth, as well as the resources for emergencies and unexpected opportunities. Donors to the Endowment help assure the legacy of UUCSR and in so doing, they leave a legacy of their own.

WAYS TO MAKE A GIFT TO THE UUCSR ENDOWMENT

When you make a legacy contribution to the Endowment you are assisting with the financial well-being of UUCSR today and long into the future. You may design a gift that addresses your immediate and future needs as well as the needs of your heirs. Following are just a few examples of how you might make a legacy gift to UUCSR.

- **Bequests**—A bequest through your will enables you to retain the asset during your life and provides significant support to UUCSR when you no longer require the asset. Alternatively, you can name UUCSR as a beneficiary in your trust.

- **Life Income Gifts**—A life income gift is an irrevocable gift of cash or securities from which you receive a predictable fixed income for your lifetime or a set period of time.

- **Insurance**—An existing or new policy may be donated, or the UUCSR Endowment may be named as a beneficiary.

- **Retirement Plan Assets**—In some cases, retirement plans, such as a 401(k) or IRA, can be some of the most heavily taxed assets a person owns. When bequeathed to UUCSR, they may be transferred tax-free.

- **Stocks, Bonds, Real Estate and Property**—Granting appreciated assets such as stock or other equities gives the donor a charitable contribution tax deduction at the current market value of the asset, thus avoiding capital gains taxes.