

**Your gift to the Endowment Fund helps establish a Legacy and helps MUF fulfill its goals for community, vision and values.**

When the Endowment Fund is more than two times MUF's annual operating budget, a portion of the Fund's assets can be allocated to major capital improvements, or the preservation of our physical facilities. In addition, allocations may be used for community outreach or for contributions to the wider mission of the UUA movement. Except under extraordinary circumstances, the Endowment Fund shall not be used to support the annual operating budget. But why donate? One reason is to be remembered by those you care about. Another reason is to make a difference. Your gift will help strengthen your spiritual community which has meant so much to you during your lifetime. There are many forms of giving that can make a lasting difference, allowing your vision and values to continue long into the future. What will be your Legacy?

### **FIND YOUR PATHWAY**

It's easier and faster than ever! The Endowment Board is ready and willing to help you understand the options and to suggest the Pathway contacts that can be of service to you.

**Have questions?  
Need more information?**

Please fill out the information below and drop this card into the Endowment Board's mail slot across from the MUF office or contact us (see below).

**Yes** I would like more information on Pathways for my Legacy.

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

**Thank You** but I already have made MUF a beneficiary in my will (or other estate planning document). For MUF's records a future estimate may equate to:

\$ \_\_\_\_\_ Other \_\_\_\_\_

### CONTACT US

Morristown Unitarian Fellowship  
c/o Endowment Fund Board  
21 Normandy Heights Road  
Morristown New Jersey 07960  
973-540-1177

10-28-10

# Pathways for Your Legacy



# To the Morristown Unitarian Fellowship

**Through the Endowment  
Process and Fund**

## How are the legacies and memories preserved at MUF?

Through the following Pathways:

- **The Endowment Fund** is a way of honoring family members and friends with a now or future gift; it is a way to donate bequests through your will, trust or life insurance.
- **The Endowment Fund Recognition Wall** documents the names of individuals and families who have made or bequeathed a major contribution to the Endowment Fund.
- **The Endowment Fund In Remembrance Albums** contains photos, memory sheets, and event highlights, all continuing to build a historical perspective.
- **The Memorial Garden** is a dedicated place for quiet meditation, rites of passage, and for our community to come together in celebration of the bonds of family and friendship. The garden's cornerstone consists of named plaques on the brick wall.
- **The Memorial Labyrinth**, rimmed by the whispering wall, is a place to contemplate the past and the future through walking meditation.
- **The Memorial Quilt**, available for memorial services at MUF, captures special memories that continue to inspire our congregation.
- **The Memorial Wall** is a panel of plaques, with names of MUF family members who have passed away.

## How you go about giving to the Endowment Fund?

There are many ways to provide a gift to the Endowment Fund, both now and in the future. Some examples are:

**Now Gifts:** Donations may be made

- In outright support of the Endowment Fund's purpose;
- In honor or in loving memory of family members or friends;
- In celebration of life events and special occasions of another person, commemorating weddings, anniversaries, births and good deeds.

In most instances, the value of the gift may provide a tax deduction for the year in which it was given.

**Future Gifts:** Not quite ready to donate a gift, but want to make sure that one is made on your behalf in the future? Some of the more popular means to provide for the future are:

- **Charitable Bequests:** You can make a bequest in your will, instructing that a specific dollar amount, or percentage of your estate and/or designated items of value, be given to the Endowment Fund. Simply put, "I give to The Endowment Fund of the Morristown Unitarian Fellowship, located in Morris Township, New Jersey, the sum of \$ X, **or** Y % of the value of my estate, **or** list the specific property, real estate, and/or financial securities".

- **Life Income Trust** allows you to make a contribution, combined with provisions of a lifetime income for yourself and/or your surviving designee. It is particularly attractive if appreciated securities are the basis for the trust since no capital gains tax need be paid. The Endowment Fund receives the full appreciated value and you achieve estate savings and income for life.
- **Life Insurance** policies are an easy, effective way to help the Endowment Fund and may permit a much larger gift than might otherwise be affordable. The gift of a life insurance policy should be within an Irrevocable Trust.

You can contact the UUA Office of Estate Planning, 25 Beacon St. Boston, MA 02108, tel. (617) 742-2100 or search their website, [www.uua.org](http://www.uua.org), for Estate Planning. Likewise, the Endowment Board can provide additional information, such as a pamphlet on:

- ***How to Make A Will That Works***
- ***Giving through Life Insurance***
- ***Giving Real Estate***
- ***Giving Securities***
- ***Better Estate Planning***

**NOTE:** Consult your legal counsel or tax advisor. However, the Endowment Board will be happy to Start you in the process. See the contact information on back of this folder.

Want to donate now, or make arrangements to donate later? It's easier and faster than ever! The Endowment Board is ready and willing to help you understand the options and to suggest Pathway contacts that can be of service to you.