

2024 UUCUC Legacy Challenge Info Sheet and Application Form

What is the 2024 UUCUC Legacy Challenge?

The 2024 UUCUC Legacy Challenge encourages congregants to include UUCUC in their estate plans and share those plans with us. In turn, UUCUC will receive current donations from Terry and Barbara England equal to 10% of the gift's future value, not to exceed \$10,000 per donor. The 10% match will apply to qualifying bequest intentions and current qualifying gifts through December 2024 or until \$100,000 in matching funds have been received. The England's generous gift will be split evenly between the General Trust Fund (Endowment) and the Capital Fund. We are so grateful for Terry and Barbara England's support of our mission and our long-term needs! This campaign will have an immediate impact on UUCUC and support our mission for many years to come!

How do I include UUCUC in my estate plans?

Here are some ways to leave an estate gift:

- Add language in your will or trust.
- Submit a beneficiary form for your IRA or other retirement account.
- Complete a transfer-on-death form at your bank or brokerage firm (or online if applicable).
- Complete the successor advisor or beneficiary form for your Donor Advised Fund.
- Include UUCUC as a beneficiary of life insurance.
- Contact generosity@uucuc.org to discuss charitable remainder trusts or gifts, real estate, or other gifts.

What information needs to be included in my estate documents or beneficiary forms?

This information may be needed:

Name: Unitarian Universalist Church of Urbana-Champaign, Illinois

Tax ID: 37-6018315

Address: 309 W Green St, Urbana, IL 61801

Phone: (217) 384-8862

Website: <http://uucuc.org>

UUCUC is a not-for-profit corporation organized under the laws of the State of Illinois.

Sample Bequest Language: You may share the following samples with your attorney to assist in drafting your documents.

Unrestricted Gift: I give _____ [\$ amount, description of property, or % of estate] to the Unitarian Universalist Church of Urbana-Champaign, Illinois for its unrestricted use.

Or

Gift to the General Trust Fund: I give _____ [\$ amount, description of property, or % of estate] to the Unitarian Universalist Church of Urbana-Champaign, Illinois to support the General Trust Fund. 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.

How do I qualify for the 10% match for a bequest intention?

1. Submit the **UUCUC Legacy Challenge Application and Bequest Intention Form** and the applicable documentation by December 15, 2024.
2. To qualify, your gift may be made to UUCUC (without donor restrictions) and/or to our General Trust Fund (also known as the Endowment or UU General Trust).
3. List the dollar amount of the gift on your form. If the value will be determined after you die, include your best estimate. (We trust you!)

What documentation is required? How do I submit it?

You only need to submit the pages that document your gift to UUCUC. You do not need to submit your complete will or trust. But, if that's easier, that's okay. Choose the document format you prefer, e.g. paper copy, pdf, scan, screenshot, etc. Submit your documentation via an upload (see the application form), email to generosity@uucuc.org, mail to the church, or give it to a Planned Giving Team Member. Send paper docs to Cate Calac, UUCUC, 309 W Green St, Urbana, IL 61801.

My spouse and I are making independent bequests. Should we submit one form or two forms?

Check the box that states I am single or my bequest to UUCUC is not affected by my spouse's survival. Gifts from each donor may be matched up to \$10,000. You may submit one form together (with two names) or two separate forms (one name each). If you submit one form, list the combined total value of your gifts on that form. Submit supporting documents for each of you.

My primary beneficiary is my spouse. If my spouse dies first, UUCUC will become a beneficiary. Am I eligible for the match?

If your gift meets all other qualifications and your spouse includes the same gift in their estate document, your gift is eligible for the match. Include both spouses' names on your application form, check the My spouse and I have included the same bequest in our estate plan box, and submit supporting documents for each of you. Include both of your names on the application form and list the actual or estimated value of the gift. Since the first spouse to die isn't leaving a gift to UUCUC, the maximum match is \$10,000.

Explain the 10% match, the \$10,000 per donor cap, and the \$100,000 maximum?

Terry and Barbara England have generously offered to give a 10% match for qualifying gifts and bequests. Here are some examples. The Englands will give UUCUC a gift of \$2,000 for a qualifying bequest of \$20,000 and a gift of \$10,000 for a qualifying bequest of \$100,000 or more. The match is capped at \$10,000 to encourage donations of all sizes and match as many gifts as possible. The Englands will give up to \$100,000 during the campaign.

Are current gifts to our Trust Fund eligible for the match?

Yes, 2024 gifts of \$10,000 or more are eligible for the match if they are given to either the church's General Trust Fund (Endowment) or split evenly between the General Trust Fund and the Capital Fund! Please notify generosity@uucuc.org that you have made a qualifying gift. Let us know if you wish to remain anonymous. No other form is required. (Estate gifts or bequests are not considered a "current gift" even if they are received in 2024.)

My planned gift doesn't qualify for the match. Should I complete the UUCUC Legacy Challenge Application and Bequest Intention Form?

Yes! Our goal is to encourage planned giving and we would like to acknowledge everyone who has created a planned gift to UUCUC. Also, we would like to know about planned gifts, even if they don't qualify for this

match. (Note: Some donors have previously reported their bequest intentions to the church office or the UUA. Different rules apply to some of these bequests. These donors have been notified of the applicable rules.)

What information will be shared with the congregation?

All donors will be acknowledged for participating in the campaign. If you wish to remain anonymous, please check that box on the application form. The amount of each person's planned gift will not be publicized unless the donor requests that the info be shared. Throughout the campaign, we will share information about the number of participants and the total commitments.

Unitarian Universalist Church of Urbana-Champaign
309 W. Green Street, Urbana, IL 61801
Tax ID 37-6018315

2024 UUCUC Legacy Challenge Application and Bequest Intention Form

The 2024 UUCUC Legacy Challenge is a generous campaign sponsored by Terry and Barbara England. Qualifying bequest intentions received by December 15th, 2024, will result in a 10% match from the Englands, with a cap of \$10,000 per donor. The England's gift will be split evenly between our General Trust Fund (Endowment) and our Capital Fund. To apply for the 10% match, submit the form below and the requested **documentation** by December 15, 2024. For more information contact generosity@uucuc.org.

Date: _____

Name (1) Please list as Anonymous

Email (1)

Preferred Phone

Check one box:

- I am single or my bequest to UUCUC is not affected by my spouse's survival.
- My spouse and I have included the same bequest in our estate plan.
- Other

Name (2) Please list as Anonymous

Email (2)

Preferred Phone

Address (Optional)

Gift Details: (Check all that apply)

- The Unitarian Universalist Church of Urbana-Champaign is in my/our estate plans.
- I/we will submit supporting documentation to generosity@uucuc.org or mail it to the church by December 15, 2024.

This bequest is directed to: (Choose One)

- The Unitarian Universalist Church of Urbana-Champaign (without donor restrictions on its use)
- UUCUC's General Trust Fund (also known as the General Trust, Endowment, or UU Trust)
- Other

List the specific amount or estimated value of this gift: _____

This legacy gift will be made via: (check all that apply)

- Will
- Trust
- Retirement Acct. or Annuity
- Brokerage or Bank Account
- Donor Advised Fund
- Life Insurance
- Other

Documentation: Submit the applicable page(s) that describe this gift. You may mail your documents to the church or attach a scan or screenshot to an email to generosity@gmail.com.

*Thank you for supporting the future of the Unitarian Universalist Church of Urbana Champaign.
Participants names will be publicly acknowledged unless the Anonymous box is checked.*

You're Done! Please **do not** complete the section below.

For Administration

- New Intention Form or 10K+ Increase in Current Commitment
- Unrestricted or General Trust
- Contingencies OK
- Amount specified. New Amount: _____ Prior Amount: _____
- Documentation Complete
- Approved Ineligible
- Amount of Match: _____
- Notified Donor: _____

Comment: _____