

Reasons to Contribute to the UUI Endowment Fund

For some people, giving is almost cultural; they were brought up to believe that one ought to give back, to share, or to tithe. To them, giving is the right thing to do. Being generous is a personal or family trait.

Some people are more emotional. They give not because it is a habit or tradition, but because they feel strongly about a cause or institution. Perhaps they have already invested much time and energy, and they want to ensure continuation in the future. Their biggest decision is figuring out how much they can afford to give.

Other people want to leave their mark on something that is dear to them. Life is ephemeral, but institutions live on, as well as the memories of those who formed them and helped them prosper. UUI represents the dreams of a group of people committed to transforming their vision into a reality. Contributing to the Endowment Fund would affirm the bonds to this vibrant church.

Whatever your reasons, the UUI Endowment Committee invites you to consider contributing to the Endowment Fund. Only you know what UUI means to you and how you can best help endow the “church of the warm heart, open mind, and helping hands.”

Ways to Contribute to the UUI Endowment Fund

There are a variety of ways to contribute to the UUI Endowment Fund. From this list, please choose the option that best suits your circumstances.

- Outright Gifts - Cash or appreciated securities (stocks, bonds, mutual funds, and appreciated property) may be made to the Fund and designated to celebrate the life, deeds, or memory of others. Our UUI Endowment Coupon Book makes that easy to implement.
- Charitable Bequests –Donations to the Fund can be provided in your personal will. The simplest form is especially attractive for those whose present financial requirements preclude a substantial gift.
- Gift of Life Insurance – Existing policies that have fulfilled original purpose may be assigned to the Fund. The face value of the policy will be paid to the Fund on death. Alternatively, the Fund may be named as beneficiary and you retain the right to make changes in the designation or distribution.
- Life Income Trust –A substantial contribution to the Fund combined with provisions for a lifetime income for you or surviving designee can be achieved. It is

particularly attractive if appreciated securities are the basis for the trust .

- Charitable Remainder Trust - IRS-qualified trusts that are flexible in form and can be tailored to fit your particular situation. (Some trusts are designed to handle assets that are not immediately available; some accept only one gift transfer; some accept an unlimited number of contributions; some pay a fixed income; and some pay a variable amount.) All charitable remainder trusts are irrevocable. All charitable trusts make payments to individuals, either for life or for a set number of years. Charitable gifts are made after the trust terminates to the Fund as listed in the trust document.

Please consult your own legal counsel or tax advisor before making any deferred gift. The Endowment Committee would be happy to work with you or you advisor in formulating and implementing an appropriate deferred giving plan to meet your own needs and circumstances.

Please make gifts and bequests to the Fund payable to the Unitarian Universalist Church of Indianapolis Endowment Fund.

UUI Endowment Committee

The Endowment Committee is the custodian of the UUI Endowment Fund. The Committee is composed of five church members who serve staggered three year terms. The mission of the Endowment Committee is to grow, manage and distribute funds of the Unitarian Universalist Church of Indianapolis endowment.

The Committee has adopted a medium risk investment philosophy. Gifts and bequests to the Fund shall accumulate until a principal amount of \$250,000 is achieved, after which the income generated from the investment of the principal may be expended.



*"Flaming Chalice" by Jim & Dianna Thornhill; a Bequest from
Charter Member Joy Davis McLaughlin (1926-1998)*

UUI Endowment Fund

The UUI Endowment Fund was established in 1993 to enhance the mission and vision of UUI apart from the general operation of the church. Gifts are administered in a manner consistent with the loyalty and devotion expressed by the grantor.

Once gifts and bequests to the Fund have accumulated to a principal amount of \$250,000, the income from the Fund may be distributed to accomplish the following purposes:

- Maintenance of the UUI physical plant
- Outreach into the community (e.g., grants to UU camps & conferences, theological schools, local social service agencies)
- Promotion of the wider mission of Unitarian Universalism (e.g., educational ministries, world mission, capital financing, scholarships or grants to UUI members for attending college in theology, nursing or medical school, UUA General Assembly or Heartland District, UU leadership conferences or similar training)



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The Gift That Grows

**Unitarian Universalist
Church of Indianapolis**
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