

Message from the Endowment Committee

Thank you for considering a legacy gift to UUMAN. Let us feel proud that our beloved community has reached the level of growth where we are ready to take this important step.

We look forward to hearing from you and working with you as we make this dream a reality for our UUMAN congregation now, and for those who come after us. We want and need your support, and we look forward to answering your questions. Sincerely, UUMAN Endowment Committee

Beverly Jordan (chair)
Colin Decker
Donna Melcher
Ashok Nagrani

Legacy Giving . . . An opportunity to live your values through your gifts

- The inherent worth and dignity of every person;
- Justice, equity and compassion in human relations;
- Acceptance of one another and encouragement to spiritual growth in our congregations;
- A free and responsible search for truth and meaning;
- The right of conscience and the use of the democratic process within our congregations and in society at large;
- The goal of world community with peace, liberty, and justice for all;
- Respect for the interdependent web of all existence of which we are a part.



**A sustainable future is
in our hands**
11420 Crabapple Road
Roswell, GA 30075



Legacy Giving



A SUSTAINABLE FUTURE IS IN OUR HANDS

Unitarian Universalist Metro Atlanta North

Table of Contents

Legacy Fund Basics..... 1

Getting Started..... 2

 What is the First Step in Giving? 2

 Then What? 2

UUMAN Vision 3

Impact Investing 4

 Investment Screening from UUCEF 4

 Other Options..... 4

Toward a Sustainable Financial Future..... 5

Toward a sustainable financial future

UUMAN Giving Programs at a Glance

<p>Stewardship Program</p> 	<p>To pay regular expenses, like our mortgage and the salaries of our paid staff. This is the Operating Fund supported by our pledges. A portion of this is designated to reserve accounts for expenses that need attention but are not a part of our regular budget.</p>
<p>Life Events Gifting Program</p> 	<p>To remember special occasions (birthdays, anniversaries, weddings, graduations, baby dedications, holidays, memorials, etc.) You may designate your gift to be applied to the Legacy Fund, the Operating Fund or to the Capital Fund (which is for approved projects requiring significant financial outlay).</p>
<p>Legacy Giving Program</p> 	<p>To allow UUMAN members to contribute to UUMAN as a part of their legacy. To enhance the financial foundation of UUMAN, the work of UUMAN in the world and the long term presence of a liberal religious community in North Metro Atlanta.</p>
<p>Special Projects Program</p> 	<p>To complete special projects approved by the Board of Trustees, but not funded through operating budget. This is typically a shorter term project. Example: playground, labyrinth</p>

UUMAN Legacy Fund Basics

Impact Investing

Not only will our legacy fund be good for UUMAN, our gifts will be deposited with the Unitarian Universalist Common Endowment Fund (UUCEF) which is invested in socially responsible mutual funds.

Companies should not have a singular view of profitability. There needs to be a balance between commerce and social responsibility... The companies that are authentic about it will wind up as the companies that make more money.
Howard Schultz – Starbucks CEO

Investment Screening from UUCEF

How and where we choose to invest can forcefully proclaim our UU ideals. Investment screening is the practice of excluding investments from portfolios based on social, environmental and governance criteria. It also includes weighting portfolios towards companies that perform better on these criteria and avoiding poor performers. Screening criteria are designed to represent UU values, as expressed in General Assembly Resolutions and Resolutions of Immediate Witness, Board resolutions and the UUA Purposes and Principles.

Other Options

Over time as the endowment fund grows, we may diversify into some Community Investment funds which keep the money right here in Georgia. Also, the UUA has matching funds programs available now which can decrease the time it takes to reach our goals. See www.wakenourvision.org

What is the UUMAN Legacy Fund?



Think of it as a permanent savings account. Only some portion of the annual interest from the Legacy Fund can be used. The principle is not touched except under guidelines established by UUMAN’s Board of Trustees.

What is the purpose of the UUMAN Legacy Fund?



Over time, this kind of endowment supports the stability of our church in good and difficult financial times. It can also support projects, grants and scholarships approved by the Board of Trustees.

Why would I contribute?



Contributing to the UUMAN Legacy Fund gives you the opportunity to make sure the same support and benefits you’ve received are there for those that follow you. It is also a way to leave a personal legacy for future generations that reflects your ideals and values at UUMAN and in the world.

Getting Started

What is the first step in giving?

“What is the legacy that I wish to leave in this world?” “How do I wish to be remembered and what work do I want to continue in this world after I am gone?” Allow yourself to recollect the beautiful things that Unitarian Universalism and this community have brought into your life. Imagine being able to pass that joy onto others.

*We drink from wells we did not dig.
We have been warmed by fires we did not build.
We are thankful for those who passed their light
to us.*

---Robert Schaibly

Then what?

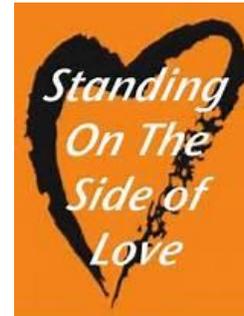
The rest is easy. UUMAN has established a legacy giving program that supports you in this process. There is a way of giving that fits every purpose and the Endowment Committee is ready to answer any questions you may have. Here are the different ways you can make a legacy gift to UUMAN:

- **Bequest** - This is a transfer of wealth that occurs upon a donor's death. Bequests can take several forms, like a percentage of the estate or a specific amount. These gifts are arranged with the **Endowment Committee**.
- **Living Gift** - A gift that is given during the lifetime of a donor for the specific purpose of supporting the legacy fund. These gifts can be made through the **Life Events Gifting Program**.

Planned gifts should be discussed with your financial professional(s) so that tax implications and benefits can be known.

UUMAN Vision

What are you supporting with a legacy gift?



We come together to create an environment that celebrates our differences, nurtures transformative growth, and promotes an open-minded search for truth and justice both within our walls and beyond.

UUMAN is a recognized leader in the Metro Atlanta North community with a solid history of more than 25 years. People have found the spiritual home here they never had and they've found a place to share their gifts. Families trying to answer those hard existential questions for themselves and their children have found inclusive, expansive teachings for all ages and stages of their lives.

In March of 2017, with a legacy gift from Rev. Cynthia Prescott, the UUMAN Legacy Fund was created to support future generations making the same journey.