

Be a Part of the

☐ Yes, I/we have included UCC in our plans or have made a current gift to establish a named fund in the Endowment Fund and would like to be members of the Legacy Society. We give permission for our names to be included in Legacy Society recognition.

☐ Yes, I/we have included UCC in our plans but would not like to be recognized publicly.

☐ Yes, I/we would like more information on UCC's Legacy Society.

Phone: _____

Email: _____



University Christian Church has a long history of serving Christ's people here and around the world. Our congregation's mission statement includes these words: "We are called to create a loving and caring community

for all people, and work together for justice and peace in our world. Recognizing that our spiritual journeys are all different, we strive to be respectful and inclusive concerning each individual's relationship with God." While this vision and mission is supported by the generous regular tithes and offerings of our members, this witness is enhanced by the estate and legacy gifts from individuals who respond to Christ's call in their lives by including the church in their planning.

The UCC Legacy Society recognizes those members and friends who have put gift plans in place or established permanent funds. The Legacy Society encourages church members and friends to make gifts from their accumulated resources to the Endowment Fund. Individuals also can make gifts to establish permanent funds within the Endowment Fund. Income from the Endowment Fund allows us to enhance our worship experience, extend our outreach and advocate for social justice, foster relationships and partnerships, provide meaningful opportunities for Christian education and spiritual growth, and nurture the arts.

Legacy giving is not limited to those with significant wealth; anyone can participate, regardless of the size of the gift. We do ask that you consider your legacy giving to be above and beyond your regular stewardship commitment.



The Board of Stewards and the Endowment Fund Committee understand that we undertake a serious responsibility when we receive your gifts.

Gifts to the Endowment Fund are typically undesignated, which allows the income to be used for projects having the highest priority. Gifts of property will be converted into cash as quickly as feasible, and added to the Endowment Fund. There is no minimum gift required or expected for the Legacy Society.

Some members wish to create a named fund within the Endowment Fund. A minimum gift of \$5,000 is required to establish a new named fund. Additions of any amount may be made to an existing fund at any time.

For individuals wanting to make a restricted gift for endowment purposes, the minimum gift is \$25,000 and the restricted purpose requires approval of the Board of Stewards if it is not already an established ministry.

*This document is not intended to provide tax or legal advice.
This brochure has been prepared for informational purposes only.
You should consult your own tax or legal professional.*



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Ways to Give

There are many ways to make gifts to University Christian Church's Endowment Fund:

- **Bequests & Beneficiary Designations**
- **Life Income Gifts**
- **Gifts of Real Estate**
- **Outright Gifts**

Bequests & Beneficiary Designations

Wills and Trusts: You can choose to leave a percentage of your estate to the church, or you might name a specific amount or asset. Another approach is to designate a "child's share": For example, if you have 3 children, divide the estate by four and give each child a fourth, with the church getting a child's share.

Life Insurance Policies: Naming the church as a beneficiary of a life insurance policy requires no additional legal work; simply contact your insurance company and complete a new beneficiary designation form.

IRAs and Other Retirement Assets: Naming the church as the beneficiary of a traditional IRA or other qualified retirement account also provides family members with some tax savings. When a tax-deferred retirement account is left to family or friends, it becomes taxable income. Since University Christian Church is a tax-exempt, non-profit organization, 100% of a gifted retirement account can go to the church's Endowment Fund while other tax-advantaged assets can be gifted to loved ones.

Gifts of Real Estate

A gift of real estate may provide income and/or estate tax benefits, the opportunity to escape the burden of managing or selling the property, and/or avoidance of the capital gains tax if the asset has been held more than one year. The church's ability to accept gifts of this nature is limited by our ability to use the gift in support of our mission. In some cases you will be asked to approve the liquidation of the asset so the proceeds can be used to support our ministries.

Life Income Gifts

Some types of planned gifts can provide an income stream to the donor. These deferred gifts, called life-income gifts, can be created by making an irrevocable gift of cash or appreciated securities in exchange for a stream of payments. The most popular types are:

Charitable Gift Annuity: This simple contract is an attractive way to provide lifetime payments to an individual or couple, create an income tax deduction for the donor and leave a planned gift for the church. University Christian Church works with the Christian Church Foundation to establish gift annuities. The minimum gift amount is \$5,000. The payout rate is based on the ages of the individual or couple when the gift annuity contract is signed. The payments are fixed for as long as the annuitant(s) live(s). The charitable remainder at the death(s) of the annuitant(s) goes to University's Endowment Fund.

Charitable Remainder Unitrust: These gifts require the creation of a legal trust document and must be funded with \$100,000 or more. This can be a very attractive and tax effective way to use highly appreciated land or securities as a planned gift while still receiving an income for life or a set number of years.

Outright Gifts

Gifts of Cash or Appreciated Securities: Outright gifts of cash to the Endowment Fund are always accepted and have an immediate impact. Appreciated assets, such as stocks and bonds, are a tax efficient way to make a gift. In addition to the gift being tax-deductible, the donor or donor's estate does not have to pay taxes on the capital gains.

Legacy Society

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*Living the good news of Jesus Christ
with open minds and loving hearts*

