



Gift Opportunities

Starr King Unitarian Universalist Fellowship
Plymouth New Hampshire

This document briefly describes the ways in which you can make a significant gift to the Fellowship.

Included here are references to important provisions of the Fellowship's Gift Acceptance Policy, approved by the Governing Board in March, 2019. You are encouraged to refer to that Policy to learn all that is contained there before making a significant gift to the Fellowship.

The Form of the Gift

A significant gift, sometimes referred to as a planned gift, might be a bequest provided for in a will or it might be a gift made during your lifetime.

The gift might be *restricted*, that is directed by the donor to benefit a specific purpose. Donors are encouraged to make restricted gifts to *established funds* of the Fellowship which are identified in this document.

Or the donor might leave the decision to designate the gift's allocation to the Governing Board. The latter type of gift is referred to as an *unrestricted* gift. Unrestricted gifts to the Fellowship are highly appreciated as they provide opportunities for direction to whatever purpose may be most needed at the time the gift is received.

The gift itself can take many forms and in this regard the Gift Acceptance Policy has established rules for what can, and cannot, be accepted. We summarize some of those rules here—the actual Policy should be consulted.

Gifts Requiring Approval of the Governing Board

These include any gift valued at more than \$500, real estate, personal property, goods or services, securities not publicly traded, gifts whose source is not transparent, and gifts that are restricted requiring Governing Board review.

Anonymous Gifts

The Fellowship will respect a donor's request to remain anonymous.

The Legacy Circle

The Fellowship will also be pleased to learn of donor intentions made, with the full understanding and appreciation that provisions in wills are sometimes contingent on certain things happening and that life changes and other circumstances might alter the plans that have been made. In 2012 ***The Legacy Circle*** was established. This continues to exist. You can become a member simply by informing one of the Fellowship's designated planned giving contacts that the Fellowship has been named as a beneficiary in your will. No details or documents are needed to become a member.

IRA Rollover Gifts

If you have an IRA and have reached the age at which you must take minimum distributions, you may be eligible to make a charitable gift to the Fellowship and enjoy several tax-advantaged benefits.

If the gift is transferred directly from your IRA provider to qualified charities like the Fellowship, one of the benefits to you is that such a gift counts toward your annual Required Minimum Distribution.

Established Funds

The Governing Board has approved a number of established funds to which gifts may be directed. Donations to these funds are the only restricted gifts not requiring a review by the Governing Board:

- * Starr King UU Fellowship Endowment Fund
- * Minister's Discretionary Fund
- * Mary Hazelton Music Fund
- * Jules Doner Sanctuary Fund

Donor information about these Established Funds are found in the document titled *Established Funds of Starr King Unitarian Universalist Fellowship*.

Available through UUA

Opportunities exist to have the expertise of planned giving specialists at the UUA work with you directly to enhance what can be done for the benefit of you, the Fellowship, and, if you wish, the UUA itself. A separate document focusing on what the UUA offers is available.

Additional Information

Speak with any one of the 3 individuals in the Fellowship who are on the Planned Giving team. Before making a gift you may need to consult your attorney and/or tax advisor to help you determine what is best for your situation.