

## Remembrance Bricks

Please inquire about our Brick Pathways program. If you decide to honor someone by having a brick installed, you may designate "Brick-Endowment" on your check.

## Memorial Garden

Have you visited the memorial garden lately? It is the walled garden on the east side of the Sanctuary.



The Unitarian Universalist Fellowship of Boca Raton

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# The Endowment Fund

Of The Unitarian Universalist Fellowship of Boca Raton



Sustaining the

- Legacy
- Continuity
- Future

Of our Congregation  
and UU Principles



## Have you Heard about The Endowment Fund?

The Unitarian Universalist Fellowship of Boca Raton Endowment Fund has been in existence since 1986. The Fund started with an initial amount of \$1,000. Since then, it has grown into a substantial asset of our religious community. And, yes, the Endowment Fund has, over the years, consistently contributed to the strengthening of Unitarian Universalism and betterment of UUFBR and the Boca Raton Community through the approval of grants for important causes and projects.

As our minister, Harris Riordan reminds us: "We drink from wells we did not dig and find shade under trees we did not plant". Our Endowment fund is the living, breathing, expression of this generous spirit and community history.

The legacy of those who have preceded us sustains us today. Our congregation has a proud and rich history of giving in support of our liberal religious ideals.

## What is Purpose of the Endowment Committee?

The Endowment Committee, elected by the congregation at its annual meeting, is charged with the responsibility for oversight of The Endowment Fund. As stated in the congregation's bylaws, the purpose of the Endowment Fund is to provide a vehicle for the administration of gifts and bequests to UUFBR for long-term development funds and for special projects.

*We use income generated from our investments to provide grants on a yearly basis. We manage The Fund with a view towards protecting principal while generating income through wise and conservative investment practices.*

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The membership directory shows who is currently serving on the Endowment Committee.

# Building Awareness

The history of our Endowment Fund is strong. For a generation, men and women of our congregation have made a mark by donating to the Fund. This expression of their deep feelings for furthering the principles of UUFBR and Unitarian Universalism, made it possible for UUFBR to become a Teaching Congregation, assist in establishing The River of Grass UU Congregation and support such community projects as Barton's Boosters and the Florence Fuller Child Development Center.

However, not all of us are aware of the Fund's existence, its purpose or its impact over the years. The Endowment Committee wants to change that by:

- ❖ **Saying *Thank You* to all who have made this fund possible.**
- ❖ **Honoring our rich history of giving.**
- ❖ **Sharing ways to build on this generous legacy with our community.**

We make a living by what we get;  
we make a life by what we give.

Winston Churchill

# How to be an Active UU ... Perpetually!

The Endowment Fund receives gifts beyond the annual operating budget of the fellowship, providing individuals the opportunity to realize the satisfaction of permanently supporting Unitarian Universalist values and principles in our congregation and the larger community.

It is a chance to leave a legacy for those who will come after us. A chance to keep our chalice light alive!

## Memorial Fund

Are you aware of The Memorial Fund? Gifts may be made at any time and in any amount to honor the memory of members or friends.

At the time of death, friends may be invited to give to the UUFBR Memorial Fund in lieu of other remembrances. Memorial Fund Cards are available through the office.

## Remember the Occasion

We now have a program for gifts (in any amount) received in honor of, or to celebrate, a person or occasion. Acknowledgement Cards will be sent to the honoree and donor.

# Ways of Giving

- ❖ **Current Gift:** An outright gift of money, securities or property is the simplest method, if you wish to receive an immediate charitable tax deduction.
- ❖ **Gifts by Will:** You may designate The UUFBR Endowment Fund as a beneficiary under your will.
- ❖ **Beneficiary Designation:** Life insurance, retirement plans, bank accounts and joint tenancies allow you to direct the proceeds of that asset into The Endowment Fund.
- ❖ **Planned Gifts:** If you are looking for income, capital gains avoidance or reduced taxes, then the planned charitable gift options such as a Charitable Remainder Trust or a Charitable Lead Trust may be right for you.

Legacy gifts may be:

**Cash:** The simplest, most direct method of gift giving.

**Securities:** Tax benefits can make appreciated securities attractive.

**Life Insurance:** Policies may be transferred easily by naming the UUFBR Endowment Fund as Beneficiary.

**Other Property of Value:** Books, art objects, or furnishings and other material of value.

# Will You Remember?

Yes!

I want to give a legacy gift to UUFBR:

- Enclosed please find my/our check to UUFBR Endowment Fund.
- Please contact me to explore options for providing for the Endowment Fund.
- I would like to honor the (birth, birthday, anniversary, graduation or memory) of:

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- My Name (Please Print Legibly)

\_\_\_\_\_

- My Phone or Email

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Please cut off this section and give it to our office or place it in the basket on Sunday.