

## *From the Minister*

*My faithful Unitarian Universalist mother instilled in me the need to make plans now for what I value beyond my own family. She made clear, through her words and her actions, that she wanted this faith to endure. We can do that here locally, as we each make responsible plans for our planned giving. This fellowship is an exceptional institution worth safeguarding.*

-The Rev. Katie Kandarian-Morris

## *Recognition*

Gifts to the Legacy Fund are valued for their intent, not for their size. UUFD publicly honors donors with a leaf on its Legacy Tree, which includes the donor's name and date of donation. Anonymous donors can designate their preferred alternate language.

## *Ready to learn more?*

For more information or to confirm that you have named UUFD in your estate plans, email [legacy@durangouu.org](mailto:legacy@durangouu.org).

*Besides love, UUFD offers solace, reason and friendship to its members and the community. I want our church to offer these qualities for a long time into the future, so I rejoice in leaving a bequest to support its continued good works.*

-Ken and Lois Carpenter

Unitarian  
Universalist  
Fellowship  
of Durango 

*UUFD's Legacy Fund Committee members can provide general information about planned giving options and provide contact information for local estate planning attorneys. We recommend that donors confer with and rely on the advice of a tax accountant, estate attorney, or financial advisor before making any significant charitable gift.*

**Unitarian Universalist  
Fellowship of Durango**

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# LEAVE A *Legacy*

The true meaning of life  
is to plant trees  
under whose shade  
you do not expect to sit.  
-Nelson Henderson



## *The Legacy Fund*

The Unitarian Universalist Fellowship of Durango has established the Legacy Fund to solicit and manage sustaining gifts from members and friends of the Fellowship. While some Legacy Fund gifts may be received during the donor's lifetime, it is expected that most will be specified in the donor's will or estate planning documents.

Legacy Fund gifts:

- Are UUFD's "savings account."
- Help ensure the long-term sustainability of Unitarian Universalism in the Four Corners region.
- Are managed by the UUFD Legacy Fund Committee, which reports to the UUFD Board of Trustees.
- Can be given using simple language in one's will or estate planning documents.
- May potentially generate significant tax benefits for the donor.

*We know that we can count on UUFD to spend our contribution in ways that are in alignment with our values. This is just one way we can continue our legacy in a way that is close to our hearts and meaningful to us.*

*-Allison and Karsten Anderson*

*We believe UUFD can be a seed to improve the lives of people in Durango and even in the wider world. Who better could we support with our time and treasure?*

*-Aline and John Schwob*

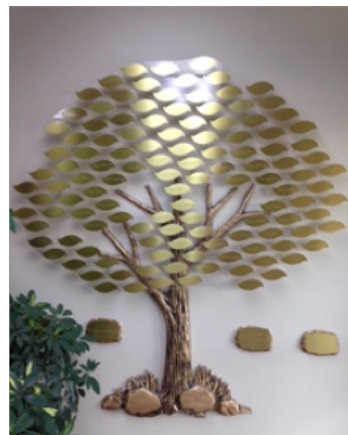
## *Types of Gifts*

Charitable giving may include:

- Gifts of cash, stocks, bonds, or other marketable securities.
- Naming UUFD as a beneficiary of a retirement account, life insurance policy, or charitable gift annuities.
- Real estate, if approved by UUFD's Gift Committee.
- Memorial gifts honoring a person or people designated by the donor.

### **RECOGNITION**

*Sample Legacy Tree.  
Leaves are engraved  
with donors' names  
and donation dates.*



## *Investment Strategy*

- Balances will be invested with a long-term growth and income perspective, in both the UU Common Endowment Fund (UUCEF)\* and in other low-fee index-based vehicles.
- Assets will be invested in an effort to increase the value of the fund.
- Disbursement of a portion of the earnings stream may be recommended by the Committee for Board approval.
- Proceeds can be used for items or projects that support UUFD's mission and enrich congregational life but are beyond the scope of the annual operating budget.

*\*The UUCEF is a diversified, professionally-managed fund that invests the long-term money of many UU congregations. It employs a socially-responsible investment (SRI) lens and is overseen by the Investment Committee of the Unitarian Universalist Association.*

*I feel fortunate to have found a group of people who are actively searching for the truth, and who are open to new truth as it discloses itself.*

*-Dave Rich, on why he designated UUFD to receive the largest single gift from his estate*