

Money Minute – August 27, 2017

The dictionary defines an Asset as “property or item of value owned by a person or entity”. The dictionary defines a Legacy as “something transmitted by or received from an ancestor or predecessor or from the past”.

You might wonder about the relevance of these terms to today’s discussion. Bear with me and we will get there together. I first started thinking about these two terms when I attended a business luncheon where two business leaders were discussing their respective businesses. One of them termed his business as an asset. He said they maximized the value of the business and then sold it when the right opportunity arose and divvied up the proceeds amongst the extended family. The second businessman termed his business as a legacy which was to be passed down from generation to generation. As each new generation came of age, they joined the business and helped it grow and derived income from it.

So, what is Sunnyhill to us? Is it an asset or is it a legacy? Is it an asset that we derive value from slowly as we cash it out bit by bit and when we are done extracting the value from it, we move on; or is it a legacy that we grow and build and hand over to each new generation in our community so that they may also derive joy and comfort from it and help it grow in ways that we can only imagine as they too secure this legacy for the generations to come?

To my family, Sunnyhill is a legacy conceived by our founders, some of who are still amongst us, who had a vision for a church of reason that would shine its bright light over the south hills community, where we would come together in our shared values and commitment to speak for those who cannot speak for themselves, to demand social justice and equality, and preach the gospel of love, compassion and acceptance. And we believe it to be our duty to give back to this community and to leave it a better place than we found it for the generations to come. And to that end, as a part of our legacy, we are including a planned gift to Sunnyhill in our will.

I would ask that you also examine whether Sunnyhill, to you, is an asset or a legacy. And if you consider Sunnyhill to be a legacy, please also consider a planned gift to Sunnyhill as part of your estate.

I have some additional good news on this front from the Unitarian Universalist collaborative consisting of six different UU national organizations. As part of their ‘Wake Now our Vision – Legacy challenge’, they will match 10% of a legacy gift, upto \$10,000 per donor. In other words, Sunnyhill could receive up to a \$1000 per member that includes a planned gift to Sunnyhill in their estate.

If you’re interested to learn more about it, I have information about this program to share. You can see me after the service in the fellowship hall. I will also include these files in the money minutes section of the website. There is a pledge form that must be filled out and sent along with supporting documentation. Supporting documentation includes a copy of the relevant

page(s) of the will or trust instrument or a copy of the completed beneficiary designation form for gifts from retirement accounts or life insurance.

And the good news is that you don't even have to actually die for Sunnyhill to receive these matching funds! As soon as you make this pledge, Sunnyhill will have access to these funds!

On a different subject, we are getting close to the kickoff for our annual canvas and this year as part of the canvas, we will be hosting Stewardship get togethers at the homes of some of our Sunnyhill members. Each party will consist of roughly 10-15 people. Each group will consist of some old-timers and some new members. We will hear from various members about how they found their way to Sunnyhill, why they stayed, what Sunnyhill means to them and how and why they contribute to Sunnyhill. And to put your minds at ease, we will not be asking anyone to make any canvas pledges or commitment at these events. This is an opportunity for you to get to know some of your fellow members and learn from their experiences at Sunnyhill. We will be announcing the dates and hosts for these events within the next two weeks and we will setup a signup sheet so that you can pick one of these events to join. I urge old-timers to carefully spread out their attendance so there are a few in every group. And, on behalf of the entire community, I would like to thank the hosts of these events. We look forward to a highly successful canvass this year and with your help, we will break every record to date!

Thank you!