



COMMON QUESTIONS

What is the Wake Now Our Vision Collaborative Campaign?

The Wake Now Our Vision: Unitarian Universalist Collaborative Campaign is a joint effort of the following UU institutions: the Unitarian Universalist Association, the Unitarian Universalist Service Committee, Meadville Lombard Theological School, Starr King School for the Ministry, the Unitarian Universalist Ministers Association, and the Church of the Larger Fellowship. Gifts made to the Wake Now Our Vision Campaign will be divided among all these organizations.

What is the Legacy Challenge?

In order to inspire new legacy gift commitments, a cash match made possible by a grant from the UU Congregation at Shelter Rock will be made for 10% of the legacy gift's estimated value (up to \$10,000 per donor.)

If no approximate amount is supplied for a legacy gift, or if the gift cannot be accurately valued at this time, a flat match of \$1,000 will be given.

I want to make a legacy gift to my congregation, too. Can that gift be part of the Legacy Challenge?

Yes! Legacy gifts made to UU congregations will also qualify for this match. It is not required that a legacy gift also be made to the Wake Now Our Vision Campaign, though we hope people will consider doing so in support of Unitarian Universalism nationally and globally, in order to support all that connects our institutions and congregations to each other.

What sort of legacy gifts count?

Legacy gifts made through a will or a trust, also known as bequests, will qualify for the Legacy Challenge. Gifts made through a retirement account or a life insurance policy also qualify and can be done easily through a beneficiary designation form.

Will Charitable Gift Annuities qualify for the Legacy Challenge?

Yes, Charitable Gift Annuities will count for the match at a flat rate of \$1,000.

What do I need to do to participate?

A pledge form and supporting documentation will need to be filled out and submitted to the UUA by each donor, or donating unit (i.e. a couple giving the same asset), to qualify for the Legacy Challenge. 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.

When do I need to make my legacy intention?

New Legacy gift intentions made between January 1, 2017 and June 30, 2020 will qualify for this legacy match program.

I already made a legacy gift intention years ago. Does that count?

Thank you for including Unitarian Universalism in your legacy plans! For the purposes of the Legacy Challenge, legacy gifts will qualify as “new” if they are made between January 1, 2017 and June 30, 2020 OR if the receiving institution is unaware of the intention. If you have already notified the receiving institution, you can still participate in the Legacy Challenge by increasing your legacy intention and/or by including additional UU organizations/congregations.

I would like to support another UU organization not listed as part of the Wake Now Our Vision Collaborative Campaign (e.g. LREDA, UU camp & conference center, etc.). Can I do that through the Legacy Challenge?

Very likely. In order to do so, you will need to have at least a portion of your legacy gift intention go to one of the six Wake Now Our Vision partners and/or a UU congregation in addition to this other organization. Contact Laura Randall to see if what you are hoping to do will qualify.

When will the UU organizations and congregations receive the match money?

Matching gifts will be released to recipients in 2019 and 2020.

How can I learn more about the Wake Now Our Vision Legacy Challenge?

Contact Laura Randall, Legacy Campaign Director, at (617) 948-6511 or lrandall@uua.org.

How can I get my congregation involved in the Legacy Challenge?

Resources for congregations are currently being developed. They include workshops, monthly webinars, brochures, and other resources to help build strong planned giving programs and promote the Legacy Challenge in our congregations. Contact Laura Randall to learn more.

I am interested in learning more about planned giving options. How can I do that?

The UUA's Legacy Gifts Office has lots of resources to help folks learn about the various options. Online gift calculators, personalized gift illustrations, sample bequest language, access to gift annuities - - the list goes on and on. The Legacy Gifts team is happy to answer your questions and help you and your congregation transform our faith through planned giving. Contact the UUA's Legacy Gifts team by emailing legacy@uua.org, calling (888) 792-5885, or visiting uua.org/giftplanning.

If I restrict my legacy gift, will it still count for the Legacy Challenge?

Yes, any restriction acceptable to the receiving organization is acceptable for the Legacy Challenge.

Can I restrict the matching money my legacy gift made possible?

No. The matching funds from the Legacy Challenge will be unrestricted. Recipient organizations are welcome to decide, via their own decision-making processes, how to allocate the Legacy Challenge match money.

My legacy gift is a percentage of my estate. How do I value that?

If you have a financial advisor or accountant, work with them to come to a reasonable, good faith estimate on the value of your gift. This can be done using the current value of the gift and factoring in expected asset growth, your expenses in retirement, and actuarial predictions. If your gift cannot be reasonably valued at this time, you can still participate in the Legacy Challenge. A flat \$1,000 matching gift will be made for non-valued gift intentions.

More questions? Contact Laura Randall, Legacy Campaign Director, at (617) 948-6511 or lrandall@uua.org.