

## **What is the Wake Now Our Vision Collaborative Campaign?**

The Wake Now Our Vision Unitarian Universalist Collaborative Campaign is a joint effort of: 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 naming the Wake Now Our Vision Campaign will be divided among all these organizations.

## **What is a legacy gift?**

A legacy gift is a gift of cash, securities or other property that is realized after you die, for example through a beneficiary designation or your will.

## **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, or if the gift cannot be accurately valued at this time, a flat match of \$1,000 will be given.

## **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 whole life insurance policy also qualify and can be done easily through a beneficiary designation form.

## **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 other UU institutions participating in the Wake Now Our Vision Campaign, though we hope you will consider doing so in support of Unitarian Universalism locally, nationally, and globally. Together, we can do more than we can alone.

## **Will immediate cash gifts be matched through the Legacy Challenge?**

No. In order to inspire legacy giving, the Legacy Challenge will only match legacy gifts.

## **Will Charitable Gift Annuities qualify for the Legacy Challenge?**

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

## **Can my legacy gift have a contingency?**

The only legacy gift contingency eligible for a match in the Legacy Challenge is the "Second to Die" contingency. This occurs when one spouse/partner leaves everything to the surviving spouse/partner and the legacy gift is ultimately made upon the death of the second spouse/partner. Each spouse/partner must have a mirror of the same legacy gift to the same WNOV partner organization(s) and/or UU congregation(s) in their estate plans in order to qualify.

## **What do I need to do to participate?**

Each donor or donating unit (i.e. a couple giving the same asset) needs to fill out and sign a Legacy Challenge form and submit the signed form and supporting documentation 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 whole life insurance policies.

### **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 so long as matching funds remain.

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

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. The value of the increase will be considered new and matched.

### **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, etc.). Can I do that through the Legacy Challenge?**

Yes. In order to do so, your gift must come through the UUA’s Umbrella Giving Program. Contact Laura Randall for more information about this.

### **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?**

- Visit [wakenowourvision.org](http://wakenowourvision.org)
- Contact Laura Randall, Legacy Campaign Director, at (617) 948-6511 or [lrandall@uua.org](mailto:lrandall@uua.org).

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

Resources for congregations include webinars, brochures, and other resources to help build strong legacy giving programs, and to 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 resources for you to learn about the various options, including online gift calculators, gift illustrations, sample bequest language, access to gift annuities, and more. Contact the UUA’s Legacy Gifts team by emailing [legacy@uua.org](mailto:legacy@uua.org), calling (888) 792-5885, or visiting [uuallegacy.org](http://uuallegacy.org).

### **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. You can use the current value of the gift and factor 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 eligible non-valued gift intentions.

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