



The following steps will secure your participation in the UUA Legacy Challenge:

Step 1. Print out a copy of the UUA Legacy Challenge Pledge Form (<http://www.wakenowourvision.org/>) or pick up a copy from the Legacy Circle mailbox outside our congregational offices.

Step 2. Complete the form and send it to: Laura Randall, Legacy Challenge Director, UUA, 24 Farnsworth Street, Boston, MA 02210-1409.

Step 3. Let UUCA's Legacy Circle Committee know you have submitted the form to Laura by emailing a quick note to legacycastle@uuasheville.org.

Step 4. Call a member of the [UUCA Legacy Circle Committee](#) if you need assistance or have any questions. You can also check out the "Frequently Asked Questions" section below.

Step 5. Know your generosity of spirit and resources is greatly appreciated!

Frequently Asked Questions

What is the UUA Legacy Challenge? The UU Congregation at Shelter Rock, NY is providing a \$5 million match to increase legacy giving to a wide range of UU organizations. Our congregation is a pilot site for this special initiative.

How will the matching awards be made? Legacy gift intentions made between January 1, 2017 and December 31, 2018 will qualify for a 10% match, up to \$10,000. And the very best part is that the matching money will be distributed to congregations and other designated UUA entities in 2019 as unrestricted money!

Who are the leaders of this special initiative? The *Wake Now Our Vision Unitarian Universalist Legacy Challenge* is a joint effort of the following major 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.

Does my participation in this Legacy Challenge also qualify me to be a member of UUCA's Legacy Circle? Absolutely! You just need to submit our [Legacy Intention Form](#) or let the Legacy Circle Committee know you wish to obtain more information (legacycastle@UUAsheville.org).

What legacy gifts qualify for this special matching opportunity?

- Legacy gift intentions made between January 1, 2017 and December 31, 2018 will qualify for this legacy matching program.

- For those who made their legacy commitments prior to January 1, 2017, an increase of any size in their legacy will allow for the entire amount of the legacy to generate a 10% match. UUA is not providing guidelines for the size of increase you need to make. They welcome any increase, it's up to you.
- A confidential UUA Legacy Challenge Pledge Form (<http://www.wakenowourvision.org/>) will need to be filled out and submitted to the Laura Randall, UUA Legacy Camping Director, by each donor to qualify for the matching program. If an approximate amount of the legacy is not included on this form, a flat match of \$1,000 will be awarded. Similarly, charitable gift annuities will also count for the match at a flat rate of \$1,000. Otherwise, the amount stated will be used as the basis for calculating the 10% match.
- You are welcome to give a percentage of your IRA or life insurance policies. For matching purposes, we suggest you use your most recent account statement or work with your financial advisors to create your best estimate of your intention and use that amount on the UUA form ([click here](#)) for the match.
- The matching money will be giving to congregations in 2019 as unrestricted money. Congregations will determine how those funds are best used.
- UUA entities (such as The Mountain Retreat and Learning Center) may be included as long as you also include a UU congregation or one of the six UU leaders of this special initiative (see above).

It is very helpful if you let the UUA Legacy Circle Committee know you have submitted forms to UUA so we can track the number of participants from our UU congregation and the amount of unrestricted matching dollars we will receive in 2019. Just email us at legacycircle@UUAsheville.org. UUA will provide the Legacy Circle Committee a total figure and names of participants on a regular basis, but the amounts of individual legacies will not be shared with UUCA at our request.