

Thank you for exploring membership in the UUA Legacy Challenge.

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 June 30, 2020 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 2019-2020 as unrestricted money!

This sounds too good to be true! Are you really saying that by my submitting the form noted below, 10% of my legacy gift amount will come to UUCA as unrestricted money with no cost to me or to UUCA? Yes!

Below are the steps for joining the Challenge, as well as Frequently Asked Questions.

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

Step 2. Please let UUCA's Legacy Circle Committee know you have submitted the form to Laura by emailing a quick note to legacycastle@UUAsheville.org. This will help us track the number of participants from UUCA and the amount of unrestricted matching dollars we will receive in 2019-2020.

Step 3. Email the UUCA Legacy Circle Committee (legacycastle@uuasheville.org) if you need assistance or have any questions. You can also check out the "Frequently Asked Questions" below.

Step 4. Know your generosity of spirit and resources is greatly appreciated!

Frequently Asked Questions:

What is a legacy gift? A legacy gift is a gift from your estate—a transfer of cash securities or other properties that is realized after you pass away. The gift can be

designated through your will or through a beneficiary designation form from your IRA or a life insurance policy, for example.

Does my participation in this Legacy Challenge also qualify me to be a member of UUCA's Legacy Circle? Absolutely! Just submit our UUCA Legacy Intention Form or email the [Legacy Circle Committee](#) to let us know you have arranged a legacy gift.

What legacy gifts qualify for this special matching opportunity?

- Legacy gift intentions made between January 1, 2017 and June 30, 2020 qualify for this legacy matching program.
- [A confidential UUA Legacy Challenge Pledge Form](#) will need to be filled out and submitted to Laura Randall, UUA Legacy Campaign 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 Legacy Challenge Pledge Form](#) for the match.
- The matching money will be given to congregations in 2019-2020 as unrestricted money. Congregations will determine how those funds are best used.