

## Purpose of the Endowment Trust

The Endowment Trust provides for the responsible management of funds raised for our Society's long term needs. Its annual income may be used for projects beyond the reach of the Society's operating budget. Its principal may be used only for compelling special needs of the Society after approval by the Endowment Trustees, the Society Board, and the members of the Society at a congregational meeting. One recent use of the principal was the major investment the Trust made to finance the new addition, which includes Emerson Community Hall.



**To sustain a vital and nurturing religious community**

## Procedures for Giving

We would like to assist you as you consider a gift to the Endowment Trust. Requests for assistance or information should be brought to the attention of any Endowment Trustee. Please contact us directly or through the First Unitarian Universalist Society of Albany, Endowment Trust, 405 Washington Avenue, Albany, New York 12206, or (518) 463-7135, or [administrator@albanyuu.org](mailto:administrator@albanyuu.org).

Gifts should be made payable to the "First Unitarian Universalist Society of Albany Endowment Trust." Gifts will be acknowledged by a receipt suitable for tax purposes. Because tax benefits vary with your specific circumstances we advise consulting with an attorney and/or accountant for professional advice.

### Endowment Trustees for 2014-15 are:

Todd Thomas, Chair  
Chris Jensen  
Sharon Babala  
Betsey Miller  
Jan McCracken  
Sue Berzinis, ex officio

## The Endowment Trust: Building a Strong Foundation for FUUSA



## First Unitarian Universalist Society of Albany

405 Washington Ave.  
Albany, NY 12206  
(518) 463-7135  
[www.albanyuu.org](http://www.albanyuu.org)

Rev. Samuel A. Trumbore, Minister

*A welcoming congregation*

## The Endowment Trust: Building a Strong Foundation for FUUSA

Former generations of members and friends bestowed a proud and accomplished legacy on today's First Unitarian Universalist Society of Albany. We, in turn, can leave a legacy for the generations that follow us.

Your gift or bequest to the Society's Endowment Trust will help sustain our vital and nurturing congregational life, support our Society's dreams for tomorrow, and maintain the beacon of Unitarian Universalism in our community. It will be an enduring and worthwhile legacy.

## Investment Policy

Gifts to the Endowment Trust are carefully invested to produce a reasonable investment return. Investments are made in accord with the principles and purposes of the Society. The Trust is overseen by five Trustees, elected by the members of our Society.

## Ways to Give

Current United States and New York State tax policies encourage gifts to religious institutions by allowing deductions from income, estate and gift taxes. Tax deductible gifts may be made to the Trust in a number of ways:

- Cash (one-time or periodic gifts). Greater Gifts invites you to commemorate life's wondrous milestones and memories, joys and sorrows, in a simple, earth-friendly, community-building way by making a gift of \$10 or more to support the ET's annual grants for worthy projects in FUUSA and beyond. Just submit a completed Greater Gifts form and your tax-deductible contribution. A form is posted on FUUSA's website at <http://www.albanyuu.org/filecabinet.html>. With your permission, the purpose of your Greater Gift (but not the amount) will be announced in WINDOWS for all to share.
- Gift of property, such as stocks, bonds and real estate. Gifts of appreciated assets have special tax advantages.
- Memorial gifts, made in memory of a deceased person or to honor a living person.
- Bequest (a gift at death under a will). All bequests to the Trust are entitled to estate tax charitable deductions.
- Life insurance, one of the simplest forms of giving.
- Trust, which creates a legal owner (trustee) of specified property for the benefit of the Society. Types of Trusts vary and can be created to meet a wide variety of financial situations.
- Unitarian Universalist Association Pooled Income Fund and Charitable Gift Annuity, two ways to give to the Society which make it possible for you to retain or improve income and obtain tax savings.

