

## ***UUCWC's Endowment Fund...***

...is our savings account for the future. It provides for long-term financial security, allowing our community and mission to continue to prosper. Just as families save so that they can enrich their lives and cover unforeseen emergencies, so should UUCWC.

The Endowment is a restricted fund, completely separate from the annual operating budget of the church, with proceeds distributed only by the Endowment Committee.

## ***Endowment Fund Management***

Our funds are invested with the UUA Common Endowment Fund, which is a professionally managed, diversified fund that supports UU values through socially responsible investing. Each year, a portion of UUCWC's Endowment Fund revenues (interest earned on the principal), if available, is dispersed through grants.

The Endowment Fund for UUCWC is managed by the Endowment Committee, which consists of at least four UUCWC members, each elected by the congregation for three-year terms. The Committee functions according to the church bylaws and articles of incorporation.

## ***Endowment Fund Uses***

The Endowment Fund is used to support unique projects at UUCWC through grants to committees, groups or members for items and projects that enrich our lives and support UU principles, but are beyond the scope of the annual operating budget. In recent years, funds have been distributed to support special social action projects, install and enhance safety and security systems, enhance Religious Education programming, and study and implement energy efficiency projects. Endowment Grants have also been used to improve technology through cell phone reception enhancement, and a microphone earpiece for the minister & DRE.

In keeping with our designation as a Green Sanctuary by the UUA, the Endowment Fund provided a seven-year loan for the installation of the solar panels. The funds were returned in less than two years.

*Message from a donor's family:*  
*"Creed and Iona Myers' financial commitment to UUCWC was based on a deeply held respect for its principles and traditions. They wanted UUCWC to prosper long after their own lights had gone out."*  
— Fran Myers

## ***Giving: Creating a Legacy***

Consider making a donation to UUCWC's Endowment Fund as a means of establishing your personal legacy and at the same time contributing to the overall strength and prosperity of our community. A gift may also be given in memory or honor of a loved one or to commemorate a special occasion, such as an anniversary or child dedication.

Your tax-deductible donation may be made payable to UUCWC with "Endowment" on the memo line.

Donations in any amount may be made at any time, either as an immediate gift or as a deferred charitable donation made through your will. (See other side for suggested form for bequests.)

Donations are typically in the form of cash, stocks, or bonds. UUCWC may be named as a beneficiary of an insurance policy or stocks. Donations made to UUCWC of property such as stocks that have appreciated substantially during ownership may result in significant income tax savings for the donor.

With the Endowment Committee's approval, real estate or some other type of asset may be donated. In some cases, the donor may retain the use of the asset for life.

## ***Top 10 Reasons to Give to the UUCWC Endowment Fund***

Consider making a contribution that helps our Endowment Fund grow while it also:

10. Honors a special occasion, such as an anniversary, wedding, or birth
9. Remembers a loved one or is a tribute to a UUCWC member
8. Establishes a legacy for the future
7. Supports special projects that further the UU principles and the mission of UUCWC
6. Continues our religious liberal values
5. Ensures the prosperity and financial security of UUCWC
4. Demonstrates your commitment to UUCWC faith community in a lasting way
3. Enables dispersal of Endowment Fund proceeds for special programs
2. Increases our capacity to grow
1. Is tax deductible!

## ***Sample Bequest to UUCWC Endowment Fund***

"I give to the Unitarian Universalist Church of Washington Crossing, Titusville, New Jersey, or to its successor, the sum of

\_\_\_\_\_ dollars

and/or  
the following assets

\_\_\_\_\_ to be added to and held as part of the Endowment Fund of the church."

For checks or documents of transfer, the legal name is:

Unitarian Universalist Church at  
Washington Crossing  
Attn: Endowment Fund

We suggest obtaining the professional assistance of an attorney or tax consultant before finalizing a bequest to the Endowment Fund.

Donors and their representatives may contact the Endowment Committee for details on arranging bequests and gifts of assets.

UUCWC Endowment Committee  
268 Washington Crossing-Pennington Road  
Titusville, NJ 08560  
endowment@uucwc.org

# **UUCWC Endowment Fund**



**Join the Journey.  
Open to You.**

Unitarian Universalist Church at  
Washington Crossing  
268 Washington Crossing Pennington  
Road  
Titusville, NJ 08560  
609-737-0515  
[uucwc@uucwc.org](mailto:uucwc@uucwc.org)