



### **Join the Heritage Society**

BuxMont members and friends who have given to the fund or who indicate to the committee that they have included the Fellowship in their estate plan are members of the Heritage Society. Members of the Heritage Society will be recognized for their generosity in the Liberal Voice and on a plaque at the Fellowship. Those who would prefer to be anonymous will not be recognized.

For information on becoming a member of the Heritage Society and supporting our liberal religious congregation please contact any member of the committee or the Fellowship Administrator

*BuxMont Unitarian  
Universalist Fellowship  
is a free, creedless  
religious congregation.  
In the discipline of truth  
and in the spirit of  
universal kinship, we  
join together in a  
cooperative quest for  
religious and ethical  
values, seeking to apply  
these values to the  
development of  
character, the  
enrichment of the spirit  
and service to all.*

# **Keep The Fire Burning At BuxMont**



**Support  
The Endowment Fund  
Of The  
Buxmont Unitarian  
Universalist Fellowship**

**Box 188  
Warrington, Pa 18976  
215-343-0406  
[www.buxmontuu.org](http://www.buxmontuu.org)**

## ***What is the BuxMont Endowment Fund?***

The endowment is BuxMont's permanent fund of money or property. It is designed to provide sustained income for our Fellowship and a reserve for special needs, now and in the years ahead.

Gifts to the Fund are invested, and the fund's earnings may be used currently to fund Fellowship needs or added to Fund principal as provided in the Fellowship's by-laws. It is BuxMont's intention to honor all requests from donors that gifts be specifically earmarked for the Endowment Fund. Restricted donations to the endowment must be specifically accepted by the Endowment Committee Members and friends who wish to make conditional gifts to the endowment (for example, limited to a specific Fellowship activity or purpose) should contact the Endowment Committee to assess suitability.

## ***Who Oversees the Endowment Fund?***

The BuxMont Endowment Committee is elected from the congregation to manage the Fund in accordance with the rules set out in the Fellowship's by-laws. These rules require that all investments be reviewed for their general compatibility with Unitarian Universalist principles. The Committee meets at least once each quarter to review the Fund's portfolio.

## ***What Investments does the Fund Make?***

The Endowment Committee has guidelines for selecting investments that meet the socially responsible guidelines of the UUA, are safe, and give a good return on investment. These guidelines are available from the UUA on request.



## ***What Difference Can Your Endowment Gift Make?***

Your gift will enrich your connection to a spiritual community that shares fundamental values. It will affirm your personal commitment to the inclusive mission of our Fellowship, and build on our free Unitarian Universalist faith. By making a gift to the Fund you help ensure that the work of the Fellowship will continue and benefit future members and friends. of the Fellowship and its friends.

## ***For What Purposes May the Fund be Used?***

A set percentage of the total value of the fund may be used by the trustees to supplement the budget of the Fellowship. In case of an emergency (flood, fire, etc) the trustees may use the principal of the fund upon a 2/3 vote of the congregation.



## ***What Kind of Gift Can I Make?***

### ***Outright Gifts -***

Gifts of real or personal property - You may make an outright transfer of cash, certificates of deposit, stock, bonds, other personal property such as art, jewelry, or real estate to the Endowment Fund. Generally, the committee will convert non-cash gifts into income-producing property. For federal income tax purposes it may be advantageous for you to make gifts in kind rather than selling the property yourself and giving the proceeds to BuxMont.

### ***Gifts by Will -***

You may designate BuxMont as a beneficiary under your will to receive either money or specific property. If you wish the gift to go to the Endowment Fund, your will should so specify.

### ***Life Insurance -***

You may transfer a life insurance policy by naming BuxMont as the beneficiary. Your tax advisor can advise you as to whether you should transfer ownership of the policy to BuxMont as well. If you wish the insurance proceeds to go to the Endowment Fund, you should so specify in a letter to BuxMont.

### ***Gifts with retention of a lifetime income -***

There are many types of life income gifts, such as immediate and deferred annuities, pooled income funds, and trusts of many kinds. During your life, the principal of these types of gifts generates income for you or a beneficiary. If you are contemplating a life income retention gift, you should consult your tax advisor.