



LEGACY GIVING

How to Prepare for Estate-planning Gifts for
the Unitarian Universalist Church of Loudoun

1. Decide What Kind of Gift You Want to Make

Common estate-planning gifts to a church or nonprofit include:

Bequests in a Will or Living Trust

- Leave a specific dollar amount
- Leave a percentage of your estate
- Leave residual assets (whatever remains after other distributions)

Retirement Accounts or Life Insurance

- Name the church as a beneficiary (full or partial) on your:
 - IRA or 401(k)
 - Life insurance policy
 - Annuity

Charitable Trusts or Other Planned Gifts

- Charitable remainder trust (CRT) – provides payments to you or others first, remainder goes to the church
- Donor-advised fund – name the church as successor beneficiary
- Gifts of real estate, securities, or other assets (if the church can accept them)



2. Get the Church's Legal Name and Tax Information

You'll need the:

- Legal name of the congregation:
 - Unitarian Universalist Church of Loudoun
- Mailing address:
 - 20460 Gleedsville Road, Leesburg, VA 20175
- Tax ID (EIN): Ask the Church Office for this.

This ensures your documents are legally accurate.



3. Insert Bequest Language into Your Will or Trust

Your attorney can do this, but many churches (including UU congregations) provide model bequest wording. A common format is:

“I give ___% of my residuary estate (or \$___) to [full legal name of the UU church], a nonprofit organization located at [address], EIN _____, to be used for its general purposes.”

If you want it restricted to a particular fund (e.g., endowment, building fund), specify that clearly.

4. Update Beneficiary Designations

Your attorney can do this, but many churches (including UU congregations) provide model bequest wording. A common format is:

“I give ___% of my residuary estate (or \$___) to [full legal name of the UU church], a nonprofit organization located at [address], EIN _____, to be used for its general purposes.”

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5. Notify Your Church (Optional but Helpful)

Most UU churches appreciate knowing you've included them:

- It allows them to thank you
- They can ensure your gift aligns with their policies
- Some congregations have legacy societies for planned-giving members

You can also give instructions about how you want the gift used. This will need prior approval and must be within the giving guidelines according to accepted governance.

6. Review Your Estate Plan Periodically

Life changes (marriage, relocation, new assets) should trigger updates to your estate plan. Beneficiary designations and wills can be adjusted at any time.

7. Consult Professionals

- Estate planning attorney – to draft or amend documents
- Financial advisor – to help with tax-efficient giving
- Church treasurer or stewardship chair – for internal guidance

This ensures the gift is set up correctly, especially if restricted or complex.

