

THE
CEDAR

LANE

LEGACY

SOCIETY

MAKE A

LASTING

DIFFERENCE



WHERE **LOVE** WORKS

"I have included a provision for Cedar Lane in my will. After my lifetime, my planned gift will help support the future of our congregation. I hope you will join me." — Lyn Peters

"Various religions posit different views about an afterlife. Of one thing I am certain, the good works of Cedar Lane must continue beyond my short tenure on this planet." — Don Bliss

"I've included Cedar Lane in my estate plans because of all this community has given to me." — Joan Riggs





Dear Friends,

I invite you to become a member of the Cedar Lane Legacy Society. By including Cedar Lane Unitarian Universalist Church in your charitable and estate plans you are making a commitment that honors the past, celebrates the present and helps to sustain a vibrant future!

Yours in faith and love,

Abhi Janamanchi

Rev. Abhi Janamanchi, Senior Minister

*“Cedar Lane UU Church has been family to me. You have been there for my joyous moments and in my darkest grief. Out of profound gratitude I have included the church as a beneficiary of my Living Trust. I want you to carry on as part of **my** family.”*

— Catherine F. Scott

“Because Cedar Lane inspires so many of us to go out into the world to do amazing things, I have designated Cedar Lane as a beneficiary of a retirement account.” — Dave Hawver

What is the Cedar Lane Legacy Society?

The Cedar Lane Legacy Society honors those who have included or plan to include the congregation in their estate plans. The Society holds an annual members reception, sponsors educational programs, and publishes timely articles about the impact of planned gifts on the future of our vision and mission.

How do I become a member of the Society?

You are eligible for membership when you confirm, verbally or in writing, that you have provided for Cedar Lane in your will or trust, or have made other planned gift arrangements. You do not need to specify an amount. There is no minimum (or maximum) gift. Just inform executive director Sara Deshler (sdeshler@cedarlane.org, or 301-493-8300, ext. 209) or a member of the Legacy Society’s steering committee at legacysociety@cedarlane.org.

All correspondence and communication will be treated confidentially and with the utmost concern for your charitable interests. Any documentation that you provide will be kept in a secure location at the church.

“Though my bounty is not great, I have cheerfully included you as a charitable beneficiary in my will.” — Anonymous



Your membership in the Legacy Society . . .

- demonstrates your belief in the importance of the future of Cedar Lane's Vision and Mission.
- expresses your gratitude in a lasting way for the people, connections and experiences that have enriched your life.
- connects you with like-minded members and friends who share your commitment to sustain and deepen Cedar Lane's vital presence in the world.

Making plans

We encourage you to consult with an attorney, financial advisor and tax professional to create a personal estate plan. In view of your situation and goals, these professionals can help you coordinate and consider tax-wise ways to make gifts while you are alive (*inter vivos* giving) or via a "legacy gift" after your lifetime (*testamentary* giving).

How will Cedar Lane use my planned gift?

It will be added to the Endowment Fund unless you designate your planned gift to support a specific Board-approved purpose, or if it is under \$10,000, Undesignated gifts under \$10,000 enrich the operating budget.

POPULAR PLANNED GIFTS

Bequests

Confer with your legal advisor about including a charitable provision for Cedar Lane in your will or living trust. Your decision doesn't affect your current financial situation and is easy to revoke if your situation changes.

You may designate:

- a specific amount
- a percentage
- a specific asset
- the "residue" of your estate after providing for loved ones.

Gifts via Beneficiary Designation

In just a few minutes—and with no attorney's fees—you can designate Cedar Lane Unitarian Universalist Church as a beneficiary of your:

- Retirement Account (IRA, 401(k), 403(b) or other qualified retirement plan
- Bank Account
- Investment Account
- Commercial Annuity
- Life Insurance Policy

Ask your retirement plan administrator or institution for a change of beneficiary or other appropriate form. Complete and return the form to the administrator, keeping a copy for your records.

Other Funding Sources

Donor advised funds, family foundations and direct charitable IRA transfers are other giving options for some donors.

Life Income Gifts

These provide fixed or flexible annual income to you or others and a significant tax deduction.

- Charitable Gift Annuity through the UUA Umbrella Giving Program for ages 65 and older. In exchange for your gift of \$10,000 or more (via cash or a transfer of appreciated securities owned for more than a year), you earn a one-time charitable tax deduction, and receive permanent fixed annual payments for life for one or two people. Payments may be much higher than your return on low-earning securities or CDs. Contact giftplans@uua.org.
- Charitable Remainder Trust
- Pooled Income Fund with the UUA
- Charitable Lead Trust

Real Estate

While you are alive or after your lifetime, give to Cedar Lane a residence (single family home or condo unit), apartment building or commercial property. You will make an extraordinary gift and remove a large asset from your taxable estate at the same time.

Retained Real Estate

Deed your home, farm, or vacation house to Cedar Lane. Save taxes with a current deduction and still use the property for the rest of your life.



"We love this community, what it stands for, and all the wonderful folks who have become part of our lives. We want to help assure its sound future by including Cedar Lane in our estate plans." — Gail Riley and Tom Nixon

Contact Information:

Cedar Lane Unitarian Universalist Church

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Executive Director Sara Deshler

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Cedar Lane Legacy Society Steering Committee

Don Bliss | dbliss@omm.com

Bob Harrison | harrisrk@msn.com

Dave Hawver | davehawver@gmail.com

Lyn Peters | lynpeters@verizon.net

Cedar Lane Legacy Society

Email legacysociety@cedarlane.org with your questions or to request a copy of *Got Your Ducks in a Row? An Orientation to Estate and Charitable Planning for UUs Who Care* (November 2016 workshop presentation).

Unitarian Universalist Association

Email giftplans@uua.org to request information about planned giving and the UUA Umbrella Giving Program.



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