

Eno River Unitarian Universalist Fellowship

Legacy Gift Intent Form

You are helping ensure a solid future for ERUUF through your Planned (Legacy) Gift, thank you! So that we can honor your wishes, please complete this Planned Giving Intent Form, and return to the ERUUF office, or send a digital copy to legacygiving@eruuf.org. Your form will be filed electronically, and remain secure and confidential. This is not a legally binding agreement and can be changed anytime.

The ERUUF Planned Giving Team is here to help! Contact legacygiving@eruuf.org or visit [Ways of Giving](https://www.eruuf.org/Ways-of-Giving) on the website (www.eruuf.org).

Choosing Where Your Planned Gift Goes - the form will ask if you would like your gift to go

(1) directly to ERUUF, to fund operations, or be added to a reserve fund, at the discretion of the Coordinating Team AND/OR

(2) to the Eno River Fellowship Foundation, to be invested in the Foundation Endowment, with the interest generated used for the benefit of ERUUF. If you choose the Foundation, you can further direct your gift to one or more funds. Without specifying a fund, your gift will be directed to the General Fund (unrestricted).

I. Initiatives and Enhancements Fund (the original fund)

The earnings from this fund are disbursed as grant proposal awards to support projects and activities that enrich the ERUUF experience, and provide resources for exploring bold, new possibilities aligned with our aspirations. The disbursed funds cannot be used for recurring operating expenses.

II. Mission and Vision Funds

Disbursed funds in this category will enhance ERUUF's capacity to achieve its mission and vision, and ensure ERUUF continues to grow, mature, and prosper. Spending priorities will be decided by the Coordinating Team.

1. The **General Fund** (unrestricted) can be used for any purpose, providing flexibility to use the disbursed funds where the need is greatest, enhancing ERUUF's capacity to respond to changing circumstances. **Donors are strongly encouraged to make gifts to this fund.**
2. The **Learning and Growth Fund** supports programs that enhance the growth and development of our community members at all stages of life, for example, religious education, spiritual development, personal growth, leadership development, and ministerial interns.
3. The **Building Beloved Community Fund** supports programs and activities that enhance spiritual fellowship, foster a sense of belonging and acceptance, and create a thriving and inclusive community. Examples include: the music program, worship experience, community celebrations, racial equity and inclusion workshops, and building right relationships seminars.
4. The **Beyond Our Walls Fund** supports justice activities outside of ERUUF and our efforts to strengthen Unitarian Universalism; for example, the work of a Justice Ministry Action Team, starting new UU congregations, or for innovative UU worship services off site.

Legacy Gift Intent Form

I/we recognize the good work of the Eno River Unitarian Universalist Fellowship and wish to support it in the future by making a legacy gift (often called a planned gift). *Please print.*

Full Name Person 1: _____

Email / Phone _____

Full Name Person 2: _____

Email / Phone _____

Please be advised that I/we intend to make a provision(s) for a designated gift to:

- ☐ Eno River Unitarian Universalist Fellowship (Tax ID 51-0151684) _____ % of gift *AND/OR*
- ☐ Eno River Unitarian Universalist Fellowship Foundation (Tax ID 58-1854360) for the following fund(s):
- ☐ Initiatives and Enhancements Fund (the original fund) _____ % of gift
 - ☐ General Endowment Fund (unrestricted) _____ % of gift
 - ☐ Learning and Growth Fund _____ % of gift
 - ☐ Building Beloved Community Fund _____ % of gift
 - ☐ Beyond Our Walls Fund _____ % of gift

The **type of gift** intended in my/our estate plans is:

- ☐ Bequest in my will or trust (excluding gifts designated to fulfill an annual pledge)
- ☐ Beneficiary of an IRA, 401K or other retirement/pension plan
- ☐ Beneficiary of a life insurance policy or annuity
- ☐ Other planned gift (e.g., UUA Umbrella Giving Service, Charitable Remainder Trust)

Should it become necessary, I hereby give permission to the ministers or staff of the **Eno River Unitarian Universalist Fellowship** and/or the Board members of the **Eno River Unitarian Universalist Foundation** to contact my family, executors or administrators of my Will or Estate Plan, as listed below:

Name of contacts _____

Address of contacts _____

Phone number and email of contact _____

- ☐ I/We would like this gift to remain anonymous.

Signature (Person 1)

Signature (Person 2)

Date