

# The Legacy Circle of the Winchester Unitarian Society

## STATEMENT OF INTENT

The Winchester Unitarian Society Legacy Circle was created to recognize and engage people in our congregation who have already made plans, or intend at a later date, to include the Society in their estate plans, establish other planned gift, or contribute cash, securities, or other assets to new or existing endowed or long-term funds. The Legacy Circle will serve as a "future-leading" group to strengthen our religious institution through these and other significant initiatives that sustain our Society's long-term future.

All intentions, or already accomplished commitments through bequests and other current and planned giving strategies, qualify you for membership in The Legacy Circle. Planned gifts include IRA charitable distributions, charitable remainder trusts, charitable gift annuities, life insurance policies naming WUS as irrevocable beneficiary, and other gift instruments, all of which offer different but significant benefits to our members. Our Stewardship Committee can provide guidance, but not legal advice, so we encourage members to seek professional assistance when considering gift options. Please refer to the Society's Gift Acceptance Policy, available on the Society's website and on request from our church administrator.

Joining The Legacy Circle is nonbinding and revocable. We invite you to join our Legacy Circle as a leader willing to explore a new and powerful process that will lay the foundation to help sustain our congregation and its vision and mission long into the future.

## PROVISION FOR A GIFT

I/We intend to include the Winchester Unitarian Society in my/our will, or estate plan, or to make a planned gift that will support endowed or long-term investment funds.

I/We have made a provision for a gift in our estate and/or financial plans:

Description of gift (optional): \_\_\_\_\_

## RECOGNITION OF YOUR GIFT

I/We authorize the Winchester Unitarian Society to recognize my/our name(s) with others in Winchester Unitarian Society's Legacy Circle in publications and other communication media.

I/We wish to remain anonymous in publications and other media.

I would like to have more information about making a bequest or other planned gift to the Winchester Unitarian Society.

Signature/s: \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_

Name/s: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone: (\_\_\_\_) \_\_\_\_\_

Please send to: Administrator, Winchester Unitarian Society, 478 Main Street, Winchester MA 01890

**Thank You!**