

As current members of our 150-year-old Society, we invite you to join us and the many members and friends of our congregation who have enrolled in The Legacy Circle. We have joined simply by stating either our intention to participate or by making a commitment to include the Winchester Unitarian Society in our charitable gift or estate planning.

By joining The Legacy Circle, you will know that you have made an enduring investment in the liberal ministry of our beloved congregation and in the presence of Unitarian Universalism in the lives of people in our region and far beyond.

To find out more about The Legacy Circle call our Church Administrator (781-729-0949), who will put you in touch with a member of our Stewardship group. This conversation will not obligate you to join and will be completely confidential.



Winchester
Unitarian
Society

478 Main Street Winchester, MA 01890 781.729.0949
www.winchesteruu.org/giving/legacycastle



THE LEGACY CIRCLE

Winchester Unitarian Society

THE LEGACY CIRCLE

is dedicated to perpetuate the ministry, mission, and vision of the Winchester Unitarian Society by means of bequests, planned gifts, and outright contributions to the church's permanent endowment funds.

MEMBERSHIP IN THE LEGACY CIRCLE OFFERS:

- A lasting affirmation and commitment by you and other leaders of our congregation to our beloved church community
- Sustaining support for our liberal religious principles that guide our church's mission
- A personal expression of stewardship of assets we have accumulated over a lifetime of hard work and fortune
- A lasting legacy that ensures the continuing development of spiritual service, compassionate work, and social action.

WHO CAN BECOME A MEMBER?

All members and friends of the Winchester Unitarian Society are eligible to join. Legacy Circle members will be annually celebrated and recognized as ongoing supporters.

HOW DO I JOIN?

Simply register your interest with a member of the church's Stewardship and Finance Committee by signing a simple intent form. It is helpful but not necessary to inform us of the details of your intended gift. Regardless, we will send you a copy of the church's gift acceptance policy to provide clarification to you and, if applicable, to your financial advisors. All correspondence with the Stewardship and Finance Committee will be treated confidentially and with the utmost concern for your charitable interests.

“We are dedicated to preserving and enhancing our beautiful building and grounds that have long-served our congregation. Our historic church building was given to us by the generosity of the congregation 120 years ago. We feel that it is now time to continue this stewardship for future generations by making our commitment to The Legacy Circle.
- Julie and Chuck Khuen ”

“The Winchester Unitarian Society remains the essential part of our connection to the community at large. We value the sincerity of its commitment to the inherent worth and dignity of every person and its honesty in that pursuit. We appreciate the stimulation WUS provides to its members and we want to support its continued growth.
- Peter and Joan Baldwin ”

HOW WILL THE CHURCH USE MY CONTRIBUTION?

Six funds will meet major long-term endowment needs: A permanent unrestricted fund, the most flexible and strategic of the endowed funds, will enable your Standing Committee to address priority needs through annual distributions. Other endowed and long-term investable funds will support building and grounds, children and youth programs and scholarships, music, social action and justice, and staff leadership and development.

Or you may designate your gift as an endowment for capital expenditures, specific programs, or special areas of interests upon the approval of the Standing Committee and in accordance with our gift acceptance policy. If you wish to designate your gift in this manner, please consult with a member of the Stewardship and Finance Committee before making your gift to ascertain if the church will be able to carry out your exact wishes. Please refer to our gifts acceptance policy, which is available on request and accessible on our members section of the website:

www.winchesteruu.org/giving/legacycircle

All in-house funds are managed or monitored by our Trustees of Permanent Funds.

WHAT ELSE SHOULD I KEEP IN MIND?

Members of the church's Stewardship and Finance Committee are available to help you learn about different gift options. They can provide technical assistance, including information about charitable gift annuities and remainder trusts that can provide lifetime income. They are not, however, qualified to give you legal or tax advice. Always consult your legal and tax advisors before making a major charitable contribution.

“I know of no better avenue toward the continued practice of the liberal religious principles practiced today by our faith community. As a Unitarian Universalist member of over twenty years, my life has been constantly enriched by beloved congregants here. Becoming a member of our Legacy Circle, I am able to contribute to the continuous availability of this most vital religious tradition.
- Betsy Ellis Bowles ”

