



*The best effort of a fine person is felt  
after we have left their presence.*

*- Ralph Waldo Emerson*

The Legacy Society of First Unitarian Church of Rochester provides a financial resource in perpetuity, extending and enhancing our church to fulfill its vision and mission. Gifts made through the Legacy Society provides a permanent way to ensure the future of our shared values and beliefs. Gifts are valued for their intent, not their size.

**THANK YOU FOR YOUR INTEREST IN  
THE LEGACY SOCIETY OF FIRST  
UNITARIAN CHURCH OF ROCHESTER.**

**TO DISCUSS YOUR PLAN OR GET  
FURTHER CLARIFICATION, PLEASE  
CONTACT A LEGACY TEAM MEMBER.**

**ALL INQUIRIES ARE HELD IN THE  
STRICTEST CONFIDENCE.**

**YOU SHOULD ALWAYS CONTACT YOUR  
ATTORNEY OR FINANCIAL ADVISOR  
BEFORE MAKING DECISIONS.**

**FOR MORE INFORMATION CALL  
585-271-9070 OR EMAIL US AT  
LEGACY@ROCHESTERUNITARIAN.ORG**



**First Unitarian Church  
of Rochester  
220 Winton Road South  
Rochester, NY 14610**



**firstunitarian**  
church of rochester

*The Legacy Society*

**A Foundation of Financial  
Security for Our Future**



**W**e, the members of First Unitarian Church of Rochester, see ourselves as a progressive liberal religious community serving the greater Rochester community and beyond. First U offers an open search for truth and meaning within the embrace of a beloved community. We recognize that continuous growth in our membership is necessary, not only to continue what we already provide, but also to increase our diversity and to be committed to serving everyone who would be nurtured by this living faith.



You can be assured that making a bequest to First Unitarian Church of Rochester is one of the most important actions you can take on behalf of the enduring security and health of the church. Your gift becomes part of a carefully safeguarded principal for the future, while a portion of the income benefits our church today.

### **Could Your Gift be Commemorative?**

You may make a gift to the Endowment Fund now or plan a gift for the future. If you so desire, your gift may take on a special meaning by acknowledging the life or deeds of another person. You may wish to commemorate weddings, births or other special events.

Your gift may also take the form of a memorial tribute to your loved ones, more enduring than flowers or other impermanent remembrances. You, your gift and the purpose being celebrated may be acknowledged publicly in whatever suitable manner you prefer.

### **How Can You Contribute?**

The Legacy Society team encourages contributions of any amount and will acknowledge these publicly if you desire. The team will appreciate knowing your intentions and may work with you toward the most satisfactory arrangement, but they are not able to provide the financial or legal advice. *We encourage you to consult with an attorney, accountant or financial advisor before making final donation decisions.*

### **Some Ways to Contribute:**

**Gifts of Cash** Your gift of cash is totally tax deductible and may provide immediate benefits to you.

**Securities** Donations of stocks, bonds, or mutual funds may be made through a transfer of ownership to the Endowment Trust. The amount of the donation would be the market value on the date of transfer. You could possibly enjoy significant tax advantages from your donation of appreciated securities.

**Wills** You may designate First Unitarian Church of Rochester as a beneficiary under your will to receive money, securities or property. This may be done with a simple codicil to an existing will.

**Life Insurance, IRA or Annuity** Your designation of First Unitarian Church of Rochester as a life insurance, IRA or annuity beneficiary may offer several options which have different tax benefits. Life income options may be arranged through the national Unitarian Universalist Association and, at your death, can benefit First Unitarian's Endowment Fund.

**Real Estate** You may donate real estate. Depending on the mechanism and your individual circumstances, the tax deduction advantage you may gain will vary. Under certain conditions, you may elect to remain in your donated home for your lifetime.