

**Return to:
Endowment Administrator
Unitarian Universalist Church of Sarasota
3975 Fruitville Road
Sarasota FL 34232**

Gifts and Stories That Shaped Our Church

Generous people have made many special gifts to this church.

When our founder, Steve **Steinecke**, died in 1957, he left a bequest to the church with the stipulation that it be used for the construction of a church and that construction begin within five years.

The land that our church sits on was a gift from Dr. and Mrs. Irving **Rosenbaum**. Groundbreaking began January 28, 1962.

Robert **Lexow**, a former president of our church, confidentially named the church as beneficiary of an annuity that matured at his death. The proceeds refurbished our buildings and anchored the endowment fund.

More recently, Rose **Mackenzie**, an active member who was a mid-wife in London during the Blitz, conveyed her two-bedroom duplex home to the church, retaining a life estate. When Rose no longer needed the home, her guardian completed the property transfer to the church. Now held by the Endowment, the home is used as the church's parsonage.

These five people, among **others** making conventional gifts, bequests and IRA beneficiary designations, made gifts to our church because they cared deeply about our future. They believed passionately in the importance of Unitarian Universalism. They wanted to make sure that our church continues its work indefinitely.

How to Ensure Our Church's Future



A Welcoming Congregation

***Endowment
for the
Unitarian
Universalist Church
of Sarasota***

What Kind of Gifts Can I Make To the Endowment?

*** Outright Gifts**

Make a gift using cash, certificates of deposit, appreciated securities, real estate or another asset with marketable value.

*** Memorials**

Give in memory of a loved one with a donation to the Endowment.

*** Bequests**

Name the church's Endowment in your will or trust. Designate a specific dollar amount or a percentage of your estate.

*** Life Insurance**

Transfer a policy with cash value to the Endowment, or name the Endowment as a beneficiary on any type of policy.

*** Life Income Gifts**

Immediate and deferred annuities, pooled income funds and trusts can provide lifetime income to you and your spouse. Upon death, the gift transfers to the Endowment.



Why Give to the Endowment?

Our Endowment ensures a vibrant and meaningful future for our Church. By making a contribution, your gift will carry forward the message of our faith and the important work of Unitarian Universalism in our community.

Why is the Fund Important?

The Endowment helps secure the long-term financial health and stability of our church. Earnings from the Endowment are distributed each year. They supplement the operating budget to support special church projects and long term growth.

Who Oversees the Endowment?

A separate Endowment board of directors provides responsible management of invested funds. The board is elected by the congregation at annual meetings and makes annual reports to the congregation. Most of the endowment funds are invested in the Unitarian Universalist Association's highly regarded Common Endowment Fund.

May I Donate Anonymously?

Yes, If you would like to remain anonymous, only those advisors assisting you will know your identity.

What is the Next Step?

A member of the Endowment Board will address your immediate questions. Then contact your professional advisors that provide you with financial planning, legal counsel and tax advice for the guidance you will need to finalize your gift.

■ **Yes, I want to make a gift to our Endowment Fund. Please contact me to discuss the various ways that I may contribute. Please have a member of the Endowment Board contact me confidentially.**

Name: _____

Address: _____

City/St/Zip: _____

Phone: _____

Email: _____

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