

What is Planned Giving?

Simply put, planned giving is an investment you make in an organization's future. It is something you can do at age 20 or age 90, regardless of your financial resources. In short, you are including an organization in your financial planning because you feel strongly about securing the financial future of that organization. Planned gifts are a variety of charitable giving methods that allow the donor to express his or her personal values by integrating charitable, family and financial goals.

Why Consider a Planned Gift to First Parish?

As in the Unitarian Universalist search for truth and meaning, there are many pathways to generosity; many ways to strengthen hope and reason; many avenues in which to use our financial resources to bend the world closer to the principles of freedom, tolerance, justice, love and respect. As members of First Parish, we want to be effective trustees and stewards of our great liberal religious heritage. We want future generations to inherit and enjoy this free faith and

all that First Parish offers, and we know financial support is vital to this hope.

Why Are Planned Gifts Important?

Planned gifts, including charitable bequests made through a will, are often the single largest and most significant gifts an individual can make to our congregation. They provide long-term support to the community and demonstrate a commitment to what has mattered most in one's life: family, friends, and an institution that shares their core values. More often than not, they are gifts intended to provide long-term or perpetual support to our congregation, such as gifts to our endowment. Planned gifts therefore are essential to the financial future of our congregation.

What Are The Gift Options?

You have many choices for the type of gift you might give to First Parish. Your contribution can be immediate or deferred. You can select a specific program close to your heart to receive a gift, or you can designate the funds to be unrestricted in which case



the Trustees manage the funds. Bequests and other forms of planned giving offer advantageous ways for you to support First Parish and receive significant tax advantages. Some of these giving vehicles provide life income at attractive rates and may be appropriate for you and your family.

Those gifts that often benefit the church and congregation the most include the following:

A GIFT OF CASH: THE SIMPLEST WAY TO GIVE

Donations to charity are tax-deductible expenses. For income tax purposes, your cash gifts are deductible up to 50 percent of your adjusted gross income for the taxable year. Any excess is deductible over the next five years.

A CHARITABLE BEQUEST: A GIFT YOU PLAN NOW AND MAKE LATER

Rare is the person who regrets having been truly generous or thoughtful. Yet, how can you give away property, securities or



"I Have Answered Yes!" —Lisa Heisterkamp Davis

Others before us "paid it forward" in the hope that First Parish would continue to thrive. For me and my family it has been a place of love, sanctuary, growth and grace. I want First Parish to remain a church capable of offering much to many. I also want my end-of-life financial planning to reflect my values. Does First Parish matter? Is First Parish worth it? I have answered **Yes!** to these questions by providing for First Parish in my will.

real estate now if you do not know whether you or your family will need those assets later? One solution is to make gifts to First Parish by means of a bequest—a gift in your will.

A GIFT OF LIFE INSURANCE: MAKE FIRST PARISH A BENEFICIARY OF YOUR POLICY

You may wish to contribute a life insurance policy that is no longer needed for its original purpose. Simply ask the life insurance company for a designation of beneficiary form. If you name First Parish as the beneficiary, the policy's proceeds will pass to First Parish after your death.

A GIFT OF SECURITIES: A GIFT THAT MAY OFFER SIGNIFICANT TAX ADVANTAGES

You may benefit in two ways by making a gift of securities such as stocks, bonds or mutual funds to First Parish. Not only will you have the knowledge that you have significantly supported our community, but you may also realize tax benefits from the gift. Check with your legal and financial advisors for options.

DONATE YOUR RETIREMENT PLAN ASSETS: ONE OF THE EASIEST WAYS TO SUPPORT FIRST PARISH

Undoubtedly, your decision of who gets the remainder of your retirement plan depends on your family members' circumstances; their needs come first. If you have already provided for your family in your estate plan, consider naming First Parish as the primary beneficiary of part or even all your retirement assets.

LIFE INCOME GIFTS: THE BENEFIT OF LIFETIME INCOME FOR YOURSELF

These gifts include Charitable Gift Annuities, Pooled Income Funds and Charitable Remainder Trusts. Typically the donor makes an irrevocable gift and receives a charitable deduction the year the gift is made. The donor or others receive income for life; the remainder is left to First Parish.

Thank You!

First Parish is deeply grateful for those who have already included our church in their planning. Make your mark on First Parish history and help ensure that our community thrives for years to come by renewing your support of our congregation or becoming a first-time donor.

Each of us can play a part.

For further information please contact the Trustees at trustees@firstparish.info or phone the church office: 781-648-3799.

First Parish does not provide legal or tax advice. Please consult with your own advisors for your own individual circumstances.

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FIRST PARISH
UNITARIAN
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Planned Giving at First Parish

