

About the Fund:

The UUSLO Endowment Fund is a financial resource in perpetuity, extending and enhancing our capacity to fulfill our mission.

The Endowment Fund provides a permanent way to ensure the future of our shared values and beliefs.

Gifts of all amounts are gratefully accepted to the Endowment Fund.

A portion of the Fund's annual income may be used for special projects or to supplement the congregation's operating budget.

Investment Policy:

Gifts to the Endowment Fund are carefully invested in socially-responsible funds which produce a reasonable return. Investments are made in accord with the UUSLO bylaws.

The Endowment Fund is overseen by a committee of five, elected by the congregation.



"THE BEST EFFORT OF A FINE PERSON IS FELT AFTER WE HAVE LEFT THEIR PRESENCE"

— Ralph Waldo Emerson

Thank you for your interest in the UUSLO Endowment Fund. Committee members look forward to working with you to help enhance the mission of UUSLO.

All inquiries are held in strict confidence.

We advise you to contact your attorney or financial advisor before you make decisions regarding significant donations.

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UUSLO ENDOWMENT FUND
2201 LAWTON AVE.,
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<http://uuslo.org/stewardship-circle/endowment-fund/>
endowment.uuslo@gmail.com

Tax ID # 92-2489070

UUSLO Endowment
Fund

Enhancing the Mission of
Our Congregation
Securing our Financial Future



We build on foundations we did not lay. We warm ourselves on fires we did not light. We sit in the shade of trees we did not plant. We drink from wells we did not dig. We profit from persons we did not know. We are ever bound in community.

— Rev. Peter Raible



You Can Leave a Legacy

Ways to Give:

Current federal and California tax policies may allow gifts to religious institutions to be deductible from income, estates and gift taxes. Tax deductible gifts to the Fund may be made in a number of ways. Among them are:

Gifts of Cash: Your gift of cash may be deductible

and gives the Fund immediate benefit through timely investing.

Securities: Donations of stocks, bonds, or mutual

funds may be made through a transfer of ownership to the Endowment Fund. The deductible amount of the

donation would be the market value on the date of the transfer. You could possibly enjoy significant tax

advantages from your donation of appreciated

securities.

Wills: You may designate the USLSO Endowment

Fund as one of the beneficiaries in your will to receive money, securities or property. This can be done with a simple modification to an existing will.

Life Insurance, IRA, Annuity, Individual

Brokerage or Bank Account: Your designation of

the USLSO Endowment Fund as the beneficiary on these accounts may offer several options which have

different tax benefits. A Charitable Remainder Trust also can provide important tax benefits.

An Enduring and Vital Gift

Generous gifts from past members and friends of USLSO have created the

endowment we have today. We, in turn, can leave a legacy for the generations that follow us.

Your gift or bequest to the Endowment

Fund sustains and supports our dreams for tomorrow and maintains the presence of

Unitarian Universalism in our community.

Making a Gift to the

Endowment Fund

Your gift to the Endowment Fund is one of the most important actions you can take to secure the future of this congregation. It becomes part of a carefully managed fund which provides annual benefits to USLSO.



Your contribution honors the dedication of those who came before us and supports the mission of this congregation, both now and in the future.
— Rev. Rod Richards

Talk to Us

The Endowment Committee welcomes the opportunity to sit down with you and discuss your legacy gift. We are not able to offer financial or legal advice. A list of members of the Endowment Committee is available on our website: uslo.org/stewardship-circle/endowment-fund/

Commemorative Gifts: Your gift may take on special meaning by acknowledging the life or deeds of another person. You may wish to commemorate weddings, births, or other special events. It can be announced publicly, or remain private.

We encourage you to consult with an attorney or financial advisor before making final decisions on substantial donations.