



*Making a planned gift to  
West Shore Unitarian  
Universalist Church is  
as easy as . . .*



Ask what gives meaning to your life and what legacy will reflect that meaning.



Be sure to include a gift to West Shore in your will or other estate plans.



Contact Finance Manager Suehana Kieres at 440.333.2255 to inform West Shore of your planned gift.

ONE CHURCH  
West Shore Unitarian Universalist Church  
MANY PATHS  
20401 Hilliard Boulevard • Rocky River, Ohio 44116  
Phone: 440.333.2255 • Fax: 440.333.2287  
www.wsuuc.org



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## COMMITMENT TO THE FUTURE

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*What gives meaning  
to your life?*

*What legacy  
will reflect that meaning?*

ONE CHURCH  
West Shore Unitarian Universalist Church  
MANY PATHS

## West Shore's Legacy Society

The planned giving program at West Shore Church encourages thoughtful gifts to build an endowment supporting programs and outreach.

### Funding Our Heritage

West Shore's financial stability is supported by three venues of giving:

1. **The Annual Canvass**, when we ask all church members to renew their commitment to the church each year, by making a pledge.
2. **Capital Campaign** held at regular intervals to support building renovations and other capital expenditures.
3. **Endowment** - a strong, permanent endowment provides financial stability that allows West Shore to take advantage of special opportunities and to help the congregation through uncertain times.

### You Can Leave A Legacy

Would you like to discuss your participation in the Legacy Society? Trained counselors are available to answer any questions you may have about West Shore's planned giving program. We can provide language for you to take to your attorney. We can discuss your legacy gift in a confidential setting. The first step is to contact church member, Tom Konkoly at 440-239-9910 to set up an appointment to discuss your Legacy Gift.

### Gift possibilities

- **A Bequest** - the simplest of planned gifts. A direction in your will or trust for a gift to West Shore. This can be a specific amount or a percentage of what remains after providing for your heirs.
- **Life Insurance** - name West Shore as an owner or beneficiary of the policy.
- **A Life-Estate Agreement** - transfer title of a residence or farm to West Shore while retaining use of the real estate for life.
- **Gift Annuity** - a gift of appreciated stock or other property, for which you or other beneficiaries received fixed annual payments. Payment is based on the age of the beneficiaries at the time of the gift. In general, the donor receives an income tax deduction now and avoids capital gains tax on the sale of the property.
- **Charitable Remainder Trust** - a gift paying income to you or to your named beneficiaries.
- **Retirement Plan Assets** - name West Shore as a beneficiary of an IRA 401 (k), 403 (b) profit-sharing or other retirement plan. The donor may receive an income-tax deduction now and avoid estate taxes later.
- **Contingency Planning** - for those who have significant estate commitments for family or other reasons may consider a "contingent bequest" that would address your West Shore priority should all other beneficiaries pre-decease. Virtually every member can provide a contingent clause while maintaining commitments for young family members or elderly parents.

### Commitment to the Future

I wish to become a member of the Legacy Society of West Shore Unitarian Universalist Church.

While I retain the right to amend my estate plans, I am pleased to inform you of my plans for a future gift to West Shore through my:

- Will
- Cash or stock for endowment
- Life insurance policy
- Retirement plan
- Charitable remainder trust
- Gift annuity
- Real estate
- Life-estate agreement
- Other \_\_\_\_\_

In the approximate amount of \$ \_\_\_\_\_

My participation in West Shore's planned giving program may motivate others:

- You may use my/our name as a donor.
- Please keep my commitment anonymous

Name \_\_\_\_\_

Date \_\_\_\_\_

Signature \_\_\_\_\_

Please mail this card in an envelope to:  
Attn: Legacy Society  
West Shore UU Church  
20401 Hilliard Blvd  
Rocky River, OH 44116