

## **ANNOUNCING THE UUFSMA ENDOWMENT FUND**

During these uncertain times, many of us are considering our legacy – how we wish to be remembered. We invite you to make a donation today and become a founding member of the UUFSMA Endowment Fund. A donation of cash or other liquid assets to our Seed Campaign now will help jump-start the Fund. A commitment now to make a bequest as part of your estate will further enhance the health of the Fund in the future. Both types of donations will provide a perpetual source of income to the UUFSMA in support of its long-term mission to:

- Enhance and expand social action grants to community organizations
- Support projects that are not part of the Fellowship operational budget
- Finance future capital expenditures which may arise, and
- Fund other commitments that enhance the mission of the Fellowship.

The Fund is now open and gratefully accepting current and bequeathed donations of any size. We encourage unrestricted gifts of liquid assets such as, cash, marketable securities, annuities, insurance policies, retirement accounts, and property that can be easily liquidated. While it is not possible to anticipate all the types of gifts that may be offered, restricted gifts that are difficult to administer or outside the basic purpose of the Fund are discouraged.

Please contact the Endowment Committee to discuss any proposed gifts and to prepare appropriate gifting documentation. Gifts with restrictions that the Committee believes fall within the mandate of the Fund will be recommended to the Fellowship Board of Directors for its final approval.

### **If you wish to bequeath Mexican assets, please include the following language in your financial documents:**

Por la presente legaré los bienes inmuebles que poseo en [dirección] con todos los contenidos en ella, a la "Fraternidad Universalista Unitaria de San Miguel de Allende A.C." Apdo 798, San Miguel de Allende 37700 Guanajuato, Mexico

(Which in English means: I hereby bequeath the real estate I own at [address] with all the contents in it, to the Fraternidad Universalista Unitaria de San Miguel de Allende A.C., Apdo 798, San Miguel de Allende 37700 Guanajuato, Mexico)

If the bequest is not real estate, please insert the description of the asset being left to the UUFSMA in your will.

### **If you wish to bequeath U.S. or Canadian assets, please include the following information in your financial documents:**

UUFSMA, 5900 Balcones Dr., Suite 100, Austin, TX 78731  
EIN: 85-1413347

Fund Assets will be invested, primarily, through the UUA Common Endowment Fund, professionally managed, and audited.

For more information or to discuss a contribution, please contact:  
Steve Singer, Chair Endowment Committee, [stevesingermx@gmail.com](mailto:stevesingermx@gmail.com).

Please note that we cannot offer estate planning, accounting or legal counsel.