

Legacy Giving

November, 2025





What is Legacy Giving?

- Primarily, it is when you “bequeath” or gift specific dollar amounts or assets, as part of a “last will & testament,” to specified parties such as family members or organizations you want to support
- Legacy Giving is something most spiritual communities have, enabling it to continue to sustain and evolve for the years ahead



How Does it Work?

- You can bequeath in various ways:
 - Designate cash (\$ or %), stocks, property in a will
 - Name UCP as a contingent beneficiary
- To do via a will, you write and sign a 1 pager, called a “codicil”, designating what specifically you want to bequeath
- Next, you have it witnessed by 2 disinterested parties and store it with your last will & testament

CODICIL TO LAST WILL AND TESTAMENT OF

(your name)

I, _____, an adult residing at _____
(address) _____ (city), _____ (state), being of sound
mind, declare this Codicil to my Last Will and Testament ("Will") dated _____,
_____, effective as of today, _____, _____.

ITEM I

Article ____ of my Will shall be modified to read:

_____.

ITEM II

Article ____ of my Will shall be stricken in its entirety.

ITEM III

Article ____ shall be added to my Will, and shall read:

_____.

YOUR NAME, Testator/Testatrix

Witness

Witness



How Will the Funds Be Used?

- The Legacy Giver has the opportunity to designate that funds go to one of five categories:
 - Capital projects for building & grounds
 - Debt reduction
 - Emergency fund security
 - Operational costs
 - Board of Trustees discretion

Finalize The Process



Click here to Email Rev. Victoria Loveland-Coen for any questions you have: [Email Question](#)



Click here to Download the Codicil, as an addendum to your will: [Download Codicil](#)



Thank You!