

**Planned Giving Options**

There are several ways to ensure the Chequamegon Unitarian Universalist Fellowship (CUUF) can thrive in the future by making a bequest through your estate plan. Consult your attorney for the one that is the best fit for you.

**1) Sample language for your will:**

**Specific Dollar Amount**

“I give and bequeath the sum of $\_\_\_\_\_\_\_ to CUUF, located at P.O. Box 641, Ashland, Wisconsin 54806, a tax-exempt nonprofit organization.

EIN # 30-0248893.”

**Specific Percentage**

 “I give and bequeath \_\_\_\_\_% of my residual estate to CUUF, located at P.O. Box 641 , Ashland, Wisconsin 54806, a tax-exempt nonprofit organization.

EIN # 30-0248893.”

**Residual Bequest**

“I give, devise and bequeath all of the residue of my estate, both real and personal to CUUF, located at P.O. Box 641, Ashland, Wisconsin 54806, a tax-exempt nonprofit organization.

EIN # 30-0248893.”

**2) Naming CUUF as a Beneficiary** on your bank accounts, IRAs or other retirement accounts. Check with your financial advisor about including CUUF as a beneficiary.

**Once you have made a bequest or other future gift, please let us know so we can thank you and welcome you as a member of the CUUF Chalice Circle! We hope you will give us permission to add your name to our growing list of Chalice Circle members, however, we will respect your wishes if you prefer to remain anonymous.**

*Please verify the appropriateness of the suggested bequest language with your professional advisor.*

*The suggested language should not be considered legal counsel.*

QUESTIONS? Contact:

Ruth Oppedahl 715-292-3872 ruth@oppedahl.com

Lois Albrecht 715-779-5630 bayfieldlois@gmail.com