

**Planned Giving Policy, Approved by the UCM Board
January 24, 2017**

Amendment to Financial Management Policies, page 14.

2. Bequests and Other Planned Gifts

It is UCM's policy to foster a deep and abiding sense of generosity among members and friends. A primary benefit is that they may include UCM in their estate plans and other financial documents designed to take effect upon their deaths, which will significantly contribute to UCM's long-term financial health and to fulfillment of its mission. The Board oversees the ongoing activities of the Stewardship Committee, which include the annual pledge drive, special gifts, planned giving, and capital campaigns. A Planned Giving Sub-Committee, within UCM's Stewardship Committee, oversees the planned giving program and encourages bequests and other planned gifts to UCM.

When the Unitarian Church of Montpelier receives a bequest or other planned gift, which specifies a particular use, the funds will be deposited in a new account specified for that purpose. If a bequest or other planned gift is received that does not specify a particular use, all of the funds will be deposited in the Long Term Invested Fund account.