



Unity of South Sound

LEGACY

Giving Program

Creating an Estate Plan Is Essential

It's never too late to create an Estate Plan, and there is always a reason to have one – no matter how much money or assets you have. It's not just about who or what to give money to when you die!

Your estate plan determines:

- What medical decisions are made and who makes them when it matters most;
- If your estate avoids probate;
- Who gets your possessions;
- Guardianship of minor children;
- The amount of support you give to the causes and organizations that are important to you.

It's important that your wishes and needs are known, and that they are documented properly under the appropriate state law – or others may be making decisions for you.

Estate plans, when done properly, can also shield your loved ones from some of the emotional and financial burden of losing you to incapacitation or death.

While not necessarily easy or comfortable to do, estate planning is essential. We send you ease and comfort as you prepare these important plans.

Leaving a gift to **Unity of South Sound** in your estate plan can help ensure our ministry continues to provide positive, practical spiritual teachings to help the next generation live healthy, prosperous and meaningful lives.

Contact Us



710 S Anderson
Tacoma, WA 98405



(253) 301-0385



office@unityofsouthsound.org



www.unityofsouthsound.org



Unity of South Sound has been transforming lives and radiating love since 1972. The loving generosity of many people over the years has ensured our spiritual home has always had the means to keep the lights on and the love flowing.

There Are Many Ways to Gift

Leaving a gift to **Unity of South Sound** in your estate plan can help ensure our ministry continues to provide positive, practical spiritual teachings to help the next generation live healthy, prosperous and meaningful lives.

You can give in many ways and as general support or for a specific purpose. In all instances, your gift will help lay a foundation of financial stability that will serve people who live after your lifetime – a legacy of love.

Gifts Anyone Can Make

- Gifts from your Will or Trust (Bequests)
- Retirement Plan/IRA: Lifetime Gifts, Distributions
- Life Insurance: Lifetime Gifts, Estate Distributions
- Tangible Personal Property
- Stocks and Appreciated Securities
- Real Estate
- Business Interests, Closely Held Stock, Partnership
- Donor Advised Funds

Gifts that Pay You Income

- Charitable Gift Annuities: Immediate Deferred, Flexible
- Charitable Lead Trusts
- Flip Unitrusts
- Charitable Remainder Trusts: Annuity Unitrusts
- Pooled Income Trusts

Each of these have different impacts to you. Consult an estate planning attorney or financial advisor for how they will apply to your situation.



Top Seven Things You Can Do to Leave a Legacy



Prepare a will or trust.

Only 50% of those who pass on have one. Without a will, you may lose control over your belongings.



Leave a gift in your will or trust for the nonprofit and charitable organizations

that made a difference in your life. Less than 6% of American households have included nonprofits in an estate plan.



Consider donating assets

for your charitable gift. These include, but aren't limited to, stocks, bonds, CDs, real estate, vehicles, art and jewelry. Such gifts may even provide tax incentives. Unity reserves the right to decide which tangible property to accept.



Remember loved ones with memorial gifts.



Name a nonprofit

of your choice as the beneficiary of your pension plan or IRA.



Purchase a new life insurance policy

naming your favorite nonprofit as the beneficiary.



Name your favorite nonprofit

as the beneficiary of an existing life insurance policy.

Thank You!

With deep appreciation, for your support of **Unity of South Sound** and for helping to create a world where all know their divine nature and intrinsic worth.

