

Planned Giving Team by Jim Lee

The Planned Giving Team consists of Don Duquette, Becky Hoort and Jim Lee and we are part of the overall Stewardship Team. Our focus is to encourage UUAA members to include a gift to our congregation and our mission in their estate plans. In 2018-2019 our team was particularly active and we had over 30 people make new or additional commitments to UUAA through their planned gifts, resulting in UUAA receiving a \$41,336 matching gift. In January 2020 we invited new and past members of The Sunderland Society, which includes anyone who has committed a planned gift to UUAA, and our staff and several other congregants, to a celebratory reception.

During the past year we have continued reaching out to congregants, though less actively than the prior year, to allow the Annual Budget and Stone Soup Campaigns to take precedence. Our most active time is typically late winter and Spring, which was curtailed by higher priorities of responding to the novel coronavirus pandemic.

If you are not yet a Sunderland Society member, and would like to include UUAA as part of your legacy, please speak with a Planned Giving Team member or e-mail plannedgiving@uuaa.org. Since 2005, UUAA and its ministries have benefited from over one million dollars in planned gifts.

Don Duquette, Becky Hoort and Jim Lee - the Planned Giving Team