

The Legacy Society
First Unitarian Church of Cincinnati

Purposes of the Legacy Society:

- 1) To recognize, appreciate and encourage the generosity of members and friends who have or intend to contribute to First Unitarian's Endowment Fund

- 2) To assist congregants to understand the importance of estate planning in general as part of our pastoral mission, by connecting them to resources for this purpose.

Initial recognition:

- Formal letter of thanks from the Endowment Board of Trustees
- Certificate of membership in appreciation of their extraordinary commitment to the church
- Small gift, such as a copy of A Holy Curiosity, by Unitarian Rev. Bruce Marshall

On-going contact:

- Annual receipt of a copy of the Endowment Annual Report
- Annual event to thank Legacy Society members and encourage others to participate in the Society

Permanent recognition of Legacy Society membership

- Names of all Society members or families (unless otherwise requested) included on a permanent feature or plaque in a highly visible location in or near the sanctuary
- Inclusion of Society members on the church web page
- Listing in the First Church Annual Report

Management responsibility

A member of the Endowment Fund Board of Trustees will serve as Coordinator of the Legacy Society

- Oversee acknowledgement of new donations, including donor certificate
- Work with church administrator to maintain updates on the web site
- Ensure all Legacy Society members will be noted in each annual report