

The two primary ways to donate monetarily to make a lasting and long-term impact for UUSS are the Heritage Fund and the Endowment Trust.

**The Endowment:** Endowment Trustees (elected by the congregation) consider and decide on requests for one-time grants for improvements to the building and grounds, the purchase of equipment, and other one-time needs. In recent years the Endowment has funded an electronic keyboard, the Labyrinth project, and equipment requested by our Safety Task Force. The recent balances of assets of the Endowment: \$424,000 (\$159,000 in mutual funds plus \$265,000 in a loan to UUSS for part of the 2014 Main Hall renovation and expansion. The Endowment is restricted by a trust document made in the 1980s. This prohibits the corpus (or principal) from ever being spent down. Total annual Endowment grants are limited to 5 percent of the principal balance. This means a large lump sum from the Endowment could never be used to support making a major expense of any kind, including capital improvements.

**The Heritage Fund:** The Heritage Fund supports improvements to the building and grounds, and it can fund one-time expenses that enhance our UUSS Mission and enact our Strategic Plan goals. The Heritage Fund has the flexibility to support large projects, including expansions, renovations or additions to the campus. Voting authority to spend from the Heritage Fund rests with our elected UUSS Board. This fund can give a starting boost to a future capital fundraising campaign, but it may not be used to fund annual operating budget expenses. The recent balance in the Heritage Fund is \$83,000, which is smaller than the Endowment's assets.

Unless otherwise designated, all one-time gifts to UUSS, including memorial contributions and beneficiary designations, would go to the Heritage Fund. (UUSS will notify the family or honoree of the name of the generous donor.) If you aren't sure of your own choice to make a lasting impact for the future vitality of UUSS, please talk to a minister, the Treasurer, or the Endowment Trust Chair. The Office can put you in touch.

*"I recommend choosing to designate the Heritage Fund, as it provides the maximum flexibility for supporting major initiatives at UUSS. I'm including it as a beneficiary designation in my retirement fund."* -- **Rev. Dr. Roger Jones**