

# U.C.C. PLANNED GIVING RESOURCES

The following print resources may be ordered through United Church Resources, Inc. at (800) 537-3394; Fax (216) 736-2206:

**FD-500 Local Church Planned Giving Manual, Third Edition** (NEW in 2003!) A resource for congregations designed to aid pastors and lay leaders in developing a congregational Planned Giving Ministry. Includes sections devoted to educational programs, management of planned gifts, ways of making gifts, and more. \$15

**CD-100 Foundation for the Future**  
This informational brochure explains planned giving, describes ways to give, and lists steps for implementing planned giving in congregations. \$40/100

**CD-600 UCF Pooled Income Fund**  
Brochure describes the UCF Pooled Income Fund and provides market value and earnings over the past decade. \$20/100

**CD-700 UCC Gift Annuities**  
Brochure presents information about UCC Gift Annuities and Deferred Payment Gift Annuities in a question/answer format, including illustrations containing sample rates and charitable deductions. \$40/100

**CD-800 Wills**  
Brochure provides instructions for planning and writing a will. Includes information on how to make a charitable bequest. \$40/100

**CD-850 Your Estate Planning Record**  
A planning tool for individuals in organizing their records for estate planning. One complimentary copy, \$1.50 each additional copy.

## VIDEO & DVD RESOURCES:

**Where There's A Will**, wills emphasis, available for \$10.00 (video) or \$7.00 (DVD) from the UCC Financial Development Office.

**Legacy of Love**, Introduction to Planned Giving, free from United Church Resources. Available in Video FD-900 or DVD FD-950

Call the Financial Development Office toll-free at (800) 846-6822 or e-mail us at [giving@ucc.org](mailto:giving@ucc.org)

The following resources are available through the UCC Financial Development Office. Use the form on the reverse side, or call (800) 846-6822; Fax: (216) 736-2297:

**Planned Giving Bulletin Inserts & "Blurbs"**  
Masters to photocopy three different series of bulletin inserts, plus "teasers" and short paragraphs for bulletins or newsletters. Free.

**Gift Annuities Packet**  
Contains application form and sample contract, among other information. \$5 (one complimentary copy).

**Charitable Remainder Trust Packet** Contains application form and sample contract, among other information. \$5 (one complimentary copy).

**Pooled Income Fund Packet**  
Contains an application form and sample contract, among other information. \$5 (one complimentary copy).

**Endowment Resources Packet**  
Contains sample guidelines and materials for establishing and promoting congregational endowment funds. \$5 (one complimentary copy).

**Wills Emphasis Resource Packet**  
Contains information and sample materials to promote a congregational wills emphasis. \$5 (one complimentary copy).

**Planned Giving Sampler Packet**  
A collection of UCC Planned Giving brochures and other information related to Planned Giving ministry. \$3 (one complimentary copy).

**Gift Annuity Informational Folder**  
Includes sample gift calculations, rate brochure, process for establishing a Gift Annuity. \$1 (one complimentary copy).

**United Church Foundation Booklet** Contains information about the funds of the United Church Foundation. Free.

## PowerPoint Presentation

The basics of life-income and other planned gifts; may be used in a workshop setting, includes accompanying script. Available by e-mail or on CD. Order from the UCC Financial Development Office.



## FINANCIAL DEVELOPMENT MINISTRY RESOURCES ORDER FORM

Name \_\_\_\_\_ Date \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_  
 E-mail \_\_\_\_\_  
 Church \_\_\_\_\_

*(Give church/organization name even if order is shipped elsewhere, and please indicate whether address is for G church/organization or G your home. Thanks!)*

			<u>Quantity</u>	<u>Price</u>
FD-500*	MANUAL: Local Church Planned Giving, 3 <sup>rd</sup> Edition	\$15 each	_____	_____
CD-100*	BROCHURE: Foundation for the Future	\$40 per 100	_____	_____
CD-600*	BROCHURE: Pooled Income Fund	\$20 per 100	_____	_____
CD-700*	BROCHURE: Gift Annuities	\$40 per 100	_____	_____
CD-800*	BROCHURE: Wills	\$40 per 100	_____	_____
CD-850*	Your Estate Planning Record	1 Free/\$1.50 each	_____	_____
	BOOKLET: United Church Foundation	Free	_____	_____
	BULLETIN INSERTS: Financial Development	Master Free	_____	_____
	BULLETIN & NEWSLETTER "BLURBS"	Master Free	_____	_____
	FOLDER: Gift Annuity Informational Folder	1 Free/\$1 each	_____	_____
	PACKET: Charitable Remainder Trust	1 Free/\$5 each	_____	_____
	PACKET: Endowment Resources	1 Free/\$5 each	_____	_____
	PACKET: Gift Annuities	1 Free/\$5 each	_____	_____
	PACKET: Planned Giving Sampler	1 Free/\$3 each	_____	_____
	PACKET: Pooled Income Fund	1 Free/\$5 each	_____	_____
	PACKET: Wills Emphasis Resources	1 Free/\$5 each	_____	_____
	VIDEO: Where There's A Will	\$10.00 each	_____	_____
	DVD: Where There's A Will	\$7.00 each	_____	_____
FD-900*	VIDEO: Legacy of Love	Free	_____	_____
FD-950*	DVD: Legacy of Love	Free	_____	_____
	PowerPoint: Basics of Life-Income Gifts G E-mailed G CD	Free	_____	_____

TOTAL DUE \_\_\_\_\_

Make check payable to: UNITED CHURCH OF CHRIST

Mail To: KAREN COLE  
 UCC FINANCIAL DEVELOPMENT MINISTRY  
 700 PROSPECT AVE E  
 CLEVELAND, OH 44115

Phone (800) 846-6822  
 Fax (216) 736-2297  
 E-mail: [giving@ucc.org](mailto:giving@ucc.org) or [colek@ucc.org](mailto:colek@ucc.org)  
 Website: [www.ucc.org/finance/fd/index/html](http://www.ucc.org/finance/fd/index/html)

\* Order from United Church of Christ Resources, Inc.  
 Phone (800) 537-3394; Fax (216) 736-2206; UCC Internet Website [www.ucc.org](http://www.ucc.org)