



Legacy Society Policy

Whereas the mission of the First Unitarian Congregational Society in Brooklyn calls us to care for one another and,

Whereas the Forward First Strategic plan requires that we responsibly manage our resources,

Therefore, the Board of Trustees:

- Creates the First Unitarian Legacy Society to encourage legacy giving and celebrate First Unitarian members who include a bequest to First Unitarian in their estate plans.
- Allocates \$250 from the current year's stewardship budget to cover start-up expenses such as Legacy Society pins, stationery, and a recognition reception.
- Appoints Sharon and Tom Kennedy to co-chair the Society for FY20-21 and FY21-22.
- Approves the following Legacy Society Policy:

First Unitarian Legacy Society Policy

The First Unitarian Legacy Society is administered by the chair(s) of the Society with the support of the congregation's staff, Senior Minister, and volunteers that the chair(s) may recruit.

The administrative staff processes and maintains records of all Legacy Society gifts and assists the chair(s) with other tasks and materials as needed.

Chairs of the Legacy Society are members in good standing appointed by the Board of Trustees for a term of two years, which may be renewed once.

The Legacy Society Chair:

- Annually asks Trustees and Deacons to lead by example by including First Unitarian in their estate plans.
- With clergy and staff, coordinates programming that encourages and informs the congregation about the Legacy Society and the value of legacy giving.
- Works with First Unitarian's staff and stewardship team to publicize the Society and recruit members and document their gifts.
- Recruits volunteers as needed.
- Organizes an event annually to recognize and thank Legacy Society members.
- Submits an annual report on new and total members.

Adopted by the Board of Trustees, February 11, 2021