



Support the Ongoing Work of the United Thank Offering through a Planned Gift to the Memorial Trust Fund (852)

Thank you for your interest in remembering the work of the United Thank Offering (UTO) in your estate planning process. Acknowledging UTO in this way will not only support the ongoing work of promoting gratitude and the awarding of thank offerings as grants, but will endure as a thank offering for all the blessings you experienced throughout your lifetime. Your gift helps to grow our ministry and honors your commitment to practicing gratitude. Your name and any intentions will be added to our Memorial Trust Fund book, available digitally and in print, as a sign of our gratitude for your life and membership in UTO.

Making a Gift to the Memorial Trust Fund (852) through a bequest in your will.

The simplest way to make a planned gift to the United Thank Offering is by naming the Memorial Trust Fund (852) in your will. A bequest to the Memorial Trust can be included when you prepare or revise your will. There are several ways to do this and while we explain those here, we do encourage you to talk these choices over with your financial advisor, the lawyer responsible for your will, and your family members.

A specific bequest is when you make a statement in your will for a specific dollar amount or percentage of your estate to be given to an organization or person. You can also specify the gift of assets (real estate, personal property, etcetera) via this process. You can also use this process to **donate personal property**. If you have UTO memorabilia or items that might be valuable to the archives that you do not want to donate until after you have died, please be certain to be specific about the items, where they are located, and what they are so that the executor of the will can easily locate them and get them transferred to UTO. (You can also send these items at any time you desire; just contact UTO staff to help you with preparing them for sending.) You can make a **residuary bequest**, which gives all or a percentage of the remainder of your estate to the Memorial Trust Fund (852) after payment of expenses and any gifts designated to other beneficiaries. Finally, you can make a **contingency bequest** to the Memorial Trust Fund (852), which will result in a gift being given only in the event of the death of other beneficiaries or the fulfillment of certain conditions outlined in the will. Please note: all gifts made to the Memorial Trust Fund are restricted gifts for carrying out the work of the United Thank Offering. If you would prefer to remember the Ingathering in your will, please indicate that the gift is restricted to the United Thank Offering Ingathering and the staff will ensure that the funds are directed to the correct account.

Examples of How to Remember the Memorial Trust Fund (852) Through Your Will

Specific Bequest

I give to the UTO Memorial Trust Fund (852) of The Domestic and Foreign Missionary Society of The Protestant Episcopal Church in the United States of America, a nonprofit corporation organized under the laws of the State of New York, with its principal office at 815 Second Avenue, New York, New York, 10017, the sum of _____ dollars (\$_____) as an unrestricted gift for UTO. Should the ministry for which this bequest is given cease to exist, or in the judgment of the Executive Council of the Episcopal Church no longer be feasible to carry out in the manner contemplated in this will, the Executive Council may devote this bequest to such other uses as it, in its sole and absolute discretion, determines to be in accordance with or similar to my original intent in making this gift.

Residuary Bequest

I give to the UTO Memorial Trust Fund (852) of The Domestic and Foreign Missionary Society of The Protestant Episcopal Church in the United States of America, a nonprofit corporation organized under the laws of the State of New York, with its principal office at 815 Second Avenue, New York, New York, 10017, ___% (percent) of the residue and remainder of my estate as an unrestricted gift to UTO. Should the ministry for which this bequest is given cease to exist, or in the judgment of the Executive Council of the Episcopal Church no longer be feasible to carry out in the manner contemplated in this will, the Executive Council may devote this bequest to such other uses as it, in its sole and absolute discretion, determines to be in accordance with or similar to my original intent in making this gift.

Contingent Bequest

I give [insert name] ___% (percent) of the rest, residue, and remainder of my estate if s/he survives me. If [insert name] does not survive me, I give to the UTO Memorial Trust Fund (852) of The Domestic and Foreign Missionary Society of The Protestant Episcopal Church in the United States of America, a nonprofit corporation organized under the laws of the State of New York, with its principal office at 815 Second Avenue, New York, New York, 10017, ___% (percent) of the residue and remainder of my estate as an unrestricted gift to UTO. Should the ministry for which this bequest is given cease to exist, or in the judgment of the Executive Council of the Episcopal Church no longer be feasible to carry out in the manner contemplated in this will, the Executive Council may devote this bequest to such other uses as it, in its sole and absolute discretion, determines to be in accordance with or similar to my original intent in making this gift.

Bequest of Specific Items

I give to the UTO Memorial Trust Fund (852) of The Domestic and Foreign Missionary Society of The Protestant Episcopal Church in the United States of America, a nonprofit corporation organized under the laws of the State of New York, with its principal office at 815 Second Avenue, New York, New York, 10017, my [insert description of the asset, if archival materials, be sure to include the location of the items], to be used and/or disposed of, as the United Thank Offering Board and Staff determines.

Regarding the naming of the trust in your will.

In 1846, by action of the Legislature of the State of New York, **The Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the United States of America (DFMS)** is the corporate entity through which The Episcopal Church and the United Thank Offering conducts most of its financial affairs. The legal name of the Trust that supports the work of the United Thank Offering is **The Memorial Trust Fund (852)**. Therefore, it is preferred to designate *UTO Memorial Trust Fund (852) of The Domestic and Foreign Missionary Society of The Protestant Episcopal Church in the United States of America* as the recipient of a gift, although a gift to "The United Thank Offering" is acceptable. The DFMS Tax ID number is: 13-5562208