

# LEGACY GIVING PROGRAM

Unity of Omaha has been transforming lives and radiating love since 1920. The loving generosity of many people over the years has ensured our spiritual home has always had the means to keep the lights on and the love flowing. Leaving a gift to Unity of Omaha in your estate plan can help ensure our ministry continues to provide positive, practical spiritual teachings to help the next generation live healthy, prosperous, and meaningful lives. You can give in many ways and as general support or for a specific purpose. In all instances, your gift will help lay a foundation of financial stability that will serve people who live after your lifetime with a legacy of your love.





Thank you, with deep appreciation, for your support of Unity of Omaha and for helping to create a world where all know their divine nature and intrinsic worth.

## CREATING AN ESTATE PLAN IS ESSENTIAL

While this brochure encourages estate giving to Unity of Omaha, its most important purpose is to encourage you to create or update your estate plan.

It's never too late to start, and there is always a reason to have one - no matter how much money or assets you have.

### Your estate plan determines:

-  What medical decisions are made and who makes them when it matters most
-  If your estate avoids probate
-  Who gets your possessions
-  Guardianship of minor
- The amount of support you give to the causes and organizations that are important to you

## WE SEND YOU EASE AND COMFORT AS YOU PREPARE THESE IMPORTANT PLANS

It's important that your wishes are known and that they are documented properly under the appropriate state law or others may need to make decisions for you. Estate plans, when done properly, can shield your loved ones from some of the decision-making and financial burdens.

## TOP 7 THINGS YOU CAN DO TO LEAVE A LEGACY

### 1. Prepare a will or trust.

Having a legal last will & testament ensures your wishes regarding your earthly belongings are implemented as you intended.

### 2. Leave a gift in your will or trust to a nonprofit organization.

Less than 6% of American households have included nonprofits in their estate plan.

### 3. Consider donating assets.

These include, but are not limited to, stocks, bonds, CDs, real estate vehicles, art, etc. Such gifts may include tax incentives.

### 4. Remember loved ones.

You can honor loved ones with memorial gifts.

### 5. Name a nonprofit of your choice

as the beneficiary of your pension plan or IRA.







### 6. Purchase a new life insurance policy

naming your favorite nonprofit as a beneficiary.




### 7. Name your favorite nonprofit as the beneficiary of an existing life insurance policy.

Consult an estate planning attorney or licensed financial advisor for how your decisions will impact your situation.

## THERE ARE MANY WAYS TO GIFT

-  Gifts from your will or trust (bequests)
-  Retirement plan, IRA, lifetime gifts, distributions
-  Life insurance: lifetime gifts, estate distributions
-  Stocks and appreciated securities
-  Business interests, closely held stocks, appreciated securities
-  Real estate

## GIFTS THAT PAY YOU INCOME

-  Charitable gift annuities, immediate, deferred, flexible
-  Charitable lead trusts
-  Pooled income trusts