

# Planned Giving Team 2016-17 Annual Report

Submitted by: Becky Hoort and Toni Wander

In service to our congregation's core values of stewardship, spiritual growth and community, the current Planned Giving Team (Don Duquette, Becky Hoort (co-chair), Jim Lee, and Toni Wander (co-chair), with crucial support from Rev. Lindasusan Ulrich and Ed Lynn) continues efforts to raise congregational awareness about planned giving options and benefits. The Team also finds ways to recognize and celebrate Sunderland Society members. The Sunderland Society is comprised of congregants and friends of the congregation who are known to have made a commitment for a planned gift (bequest, etc.) to UUAA.

This year's projects include:

- Camaraderie at a May 2016 reception for Sunderland Society members, held at the home of Jim Lee and Terri Wilkerson
- Thanksgiving cards expressing our gratitude to Sunderland Society members
- Recruitment of new members to the Planned Giving Team
- Updating our records and database of planned giving donors, as well as our Sunderland Society plaque, found on the wall outside the Phifer Sanctuary
- Continued work on printed materials, including a new brochure
- A May 5th workshop on Financial and Estate Planning for Young Families led by Jane Bassett, a local attorney, and our own Toni Wander, a Financial Planner

Since 2005, generous planned gifts have amounted to more than \$900,000, and have made substantial contributions to the vitality and outreach of our congregation. We are excited about the rollout of our '20 by 20' Campaign, with a goal of adding twenty or more planned giving commitments by the end of 2020. If you are not already a Sunderland Society member, will you be one of the twenty? We hope so! Please speak to a member of the Planned Giving Team or email us at [plannedgiving@uuaa.org](mailto:plannedgiving@uuaa.org) for more information.