

UUFES

Direct IRA Giving

Thank you for considering a direct gift from your IRA to UUFES, a tax-wise approach available to individuals aged 70 ½ or above.

To proceed, you will need to work through the financial institution that manages your IRA. They most likely have a form you will need to complete, so to get started, contact them and request instructions. Be sure to spell out UUFES's full legal name, as "Unitarian Universalist Fellowship of the Eastern Slopes," and supply the mailing address below. Should UUFES's tax ID be required, it is: 04-xxxxxxx

Per IRS regulations, the gift must go directly from the financial institution to UUFES, without passing through your personal bank account.

Please notify the office (at xyz email) that your gift is on the way, so they can be on the lookout for it. Please inform them how you want your gift allocated -- perhaps some as your pledge for the current year, and the remainder to the Endowment?

If you have questions about this IRA direct giving approach, feel free to reach out to any Finance Committee volunteer. The office (email here), (603) 323-8585 can point you to the current volunteers.

UUFES

P.O. Box 474, Tamworth, NH 03886

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uufesoffice@gmail.com ?