

Morristown Unitarian Fellowship

Endowment Fund

Frequently Asked Questions

What is the Endowment Fund at the Fellowship?

The Morristown Unitarian Fellowship's Endowment Fund was established in 1994 in order to secure, strengthen and extend the long term vision of the Fellowship. Contributions to the Fund are invested to ensure the future financial security of the fellowship and to provide for special projects in education, social justice and outreach.

How is the Fund administered?

The Fund is administered by the **Endowment Board** whose members are elected from the congregation for a three-year term. **The Minister and the President** of the Fellowship's Board of Trustees are non-voting advisory trustees of the Endowment Board.

How can we contribute to the Fund?

The Fund was established and continues to be built with small and large gifts from members and friends commemorating births, weddings, deaths, in honor of, and other important events in our lives. In addition, many members have included bequests to the Fellowship in their estate plans, as beneficiaries for life insurance policies, IRAs or mutual funds as part of their planned giving.

Contributions to the Fund can be made by cash, check, credit card, stock certificates or via the website. All contributions are tax deductible.

How is the Fund managed and monitored?

The assets of the Fund are owned by and belong to the Fellowship and are invested in accordance with long term vision of the Fellowship. The Fund is currently managed by the Community Foundation of New Jersey in a combination of fixed income and equity index funds. Financial records are integrated with the overall Fellowship accounting systems for tracking and monitoring.

How are disbursements managed from the Fund?

The Fund's assets will be reinvested until its value is twice the annual operating expense budget for the Fellowship. The Endowment Board will then seek Fund Allocation suggestions from the Fellowship Board and Committees and present its recommendations to the Fellowship's Board for their approval. Recommendations shall include major capital improvements or preservations to the physical facilities of the Fellowship. In addition, recommendations may include significant investments for outreach in the community or contributions to the wider mission of the Unitarian Universalist movement.

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How are legacies and memories preserved at the Fellowship?

In the following ways:

- ***The Endowment Fund:*** Honors family members and friends with a now or future gift.
- ***The Recognition Wall: (Hallway to meeting room):*** Records the names of individuals and families who have made or bequeathed a major contribution to the Endowment Fund.
- ***The In Remembrance and Celebration Albums (Library):*** Contains names of those who donated “In Honor Of” or “In Memory Of” along with photos, memory sheets and event highlights.
- ***The Memorial Garden (outside in north-western plot):*** A dedicated place for quiet meditation, rites of passage and community celebration. The garden’s cornerstone consists of named plaques on the brick wall.
- ***The Memorial Labyrinth (Southern part of land):*** A place to contemplate rimmed by the whispering wall.
- ***The Memorial Quilt (see office):*** Captures special memories that continue to inspire our congregation. Used in memorial services.
- ***The Memorial Wall (Library):*** A panel of plaques with names of Fellowship members who have passed away.

If you have any questions or would like any additional information please contact any of the Endowment Board of Trustees or email us at endowment@muuf.org .

Endowment Board of Trustees:

Venkat Puranapanda, Chair
Elizabeth Bain, Secretary
John Oehler, Treasurer
Tom McGuinness
Barbara Pecca

[Endowment “Pathways for Your Legacy to the Morristown Unitarian Fellowship” Brochure hyperlink](#)

[Link to UUA website for planned giving](#)

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MEMBERS SECTION

- Endowment Fund By laws
- Treasurer's reports – use report that consolidates data on version used by endowment board
- Meeting Minutes
- List of Contributors –
 - Album Updates
 - Your contributions, just type your last name

(LINK LAST NAME INTO THE **1994 - 2015 RECORDS** AVAILABLE, IN EXCEL FORMAT SORTING ON LAST NAME AND THE FOLLOWING TABLE IS POSTED ON MONITOR

Your Name	Date of Gift	Amount	Year Qualified for Recognition Wall	TYPE: IMO, IHO, ENDOW	Recipient
Andy Smith	1998	\$25		IMO	Jones
Andy Smith	2003	\$25		IHO	Sonez 80 th birthday
Andy Smith	2004	\$50		END	MUF
Andy Smith	2011	\$5,000		END	MUF
Total all gifts		\$5,100	2011		

List of Contributors (con't)

Recognize Recipients (above table can be built for recipients)

- Gift acceptance guidelines and procedures is this for deposits, thank you and records?
- Upcoming events?
- Link to Contributions area (To give to Endowment [click here](#)) fill out Future or Now sheet == sheet for each