

Legacy Fund Policy-Revised
Board of Trustees

Adopted May 19, 2016

(Supersedes policy originally adopted in 2013)

Background

The Legacy Fund was created to set aside money donated from Tom Berg's estate. Since then, a gift of \$10,000 from the estate of Nick Williams has been added. The Fund Balance at April 30, 2013 is \$443,238.22. It is anticipated gifts of \$10,000 or more, which are not designated to another fund, will become part of the Legacy Fund.

Guiding Principles

It is important that we set an intention for this fund so that people may consider donating to it as a part of their lasting legacy.

The funds will be used, whenever possible, to enhance the ability of the congregation to live out its mission and to help us do things we otherwise could not do.

Consideration will be given to continuing bold initiatives if they have the potential to become self-sustaining.

Examples of ways the Legacy Fund may be used: Money used for matching grants might help grow the generosity of the congregation. Money to seed a new position or initiative might grow the generosity and capacity of the congregation. A one-time use of the money to enable us to do something we could not do otherwise might also grow our capacity.