

Planned Giving How To:

Designating ERUUF and/or the Foundation as a Beneficiary of a Retirement Account

First, decide if you would like your legacy gift to go **(1) directly to ERUUF**, to fund operations, or be added to a reserve fund, at the discretion of the Coordinating Team/Ministers **OR (2) to the Eno River Fellowship Foundation**, to be invested alongside other gifts in the permanent Endowment managed by the Foundation Board, with the interest generated used for the long-term benefit of ERUUF. (If you choose the Foundation, you can further direct your gift, via an ERUUF Intent Form, be invested in one of several funds, but that is optional.)

Second, to name either ERUUF or the Eno River Fellowship Foundation as a beneficiary:

1. Contact your retirement plan administrator for a change-of-beneficiary form.
2. Decide what percentage (1 to 100) you would like ERUUF or the Foundation to receive and include the name ("Eno River Unitarian Universalist Fellowship" and/or "Eno River Fellowship Foundation") along with the percentage you chose, on the beneficiary form.
3. If requested, you can supply the address which is the same for both: 4907 Garrett Road, Durham, NC 27707
4. Return the completed form to your plan administrator.

Third, please complete an [Intent Form](#) (download or print, and either mail to ERUUF, or send electronically, OR complete and leave a form, available at the ERUUF office).

For more information, visit:

[Choosing How Your Legacy Gift is Used](#)
[Way of Giving](#)

Or contact the Planned Giving Team

plannedgiving@eruuf.org