**Cloud Legacy Society Charge**

In December 2009, the UUSD Board of Trustees approved the formation of a UUSD legacy organization to be called the Cloud Society as a sub-committee of the Finance Committee with the authorization to manage the UUSD legacy program. In February 2025, to clarify the purpose of the Cloud Society, the Finance Committee proposed that the name be amended to include the word “legacy”. The charge is amended to reflect that change to Cloud Legacy Society.

The goal of the Cloud Legacy Society is to create awareness amongst UUSD members as to how they can provide for the long-term viability of UUSD, simply by making direct bequests and designating UUSD as a beneficiary in ones’ will, life insurance policy, estate plan, or by establishing a pre-death gift. In addition, a UUSD member can make an umbrella gift to both the UUA and to UUSD through the UUA’s gift program.

The Finance Committee will maintain a UUSD Gift Acceptance Policy, approved by the Board, to establish what and how donations, including legacy gifts, are accepted.

The Cloud Legacy Society will inform the Finance Committee and the Board of all legacy gifts, and the Board will decide whether to accept any restrictions included therein. In addition, it is the responsibility of the Cloud Legacy Society to record and report the receipt of all legacy gifts to UUSD honoring any donor requests for anonymity.

Amended and endorsed by the Finance Committee, April 21, 2021.

Approved by the UUSD Board of Trustees May 17, 2021.

Amended and endorsed by the Finance Committee February 6, 2025.

Approved by the UUSD Board of Trustees February 11, 2025