

The Endowment Fund is a permanent gift to generations to come - one that lets you designate your support for the things that mean the most to you.

You can make your gift — and leave your mark on the future — at any time.

Contact us for further information. We can arrange a meeting with the pastor or with a member of the Endowment Committee to explore how a gift to this permanent fund can fit into your overall stewardship and estate planning.

We can also refer you to an appropriate professional, and we encourage you to consult your own advisor on estate and tax matters.



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Get a Good Thing  
**GROWING**



with a gift to the  
**Endowment  
Fund**

**California-Nevada  
United Methodist Foundation**

## The Endowment Fund of “Your church name here”

The Endowment Fund provides income in perpetuity for the mission and ministries of our church. It is a permanent fund; the principal is invested and only its earnings are used.

Investment income generated by the fund is used in specific areas of mission. Many of us have deep feelings for some area of worship, or for a ministry that has been a significant part of our faith journey. When you make a gift to the Endowment Fund, you may make designate your gift to support the area most important to you:

- Children and Youth
- Local and World Mission
- Unrestricted Endowment
- Gardens and Landscaping
- Building Maintenance & Care

## How Can I Make a Difference?

There are many ways to give and many creative vehicles which may provide significant tax advantages and income streams during your lifetime.

The following list is an overview of gift plans to consider; we can provide additional information on any topic of interest to you:

- Outright current gifts of cash, marketable securities;  
real estate or other property such as art or jewelry;
- A bequest made in your will or estate plan;
- A Life Insurance Policy assignment;  
A Life Income Gift such as a Charitable Remainder Trust, or a Gift Annuity sponsored by the California-Nevada United Methodist Foundation

## Consequences of Your Gift

Tax consequences can be significant and very favorable. They will vary according to the type of gift and the specifics of your circumstances. We are available to help you understand your giving options. We also encourage you to consult your own tax advisor.

Possible tax treatments include:

- Life income gifts may offer an immediate income tax deduction as well as an ongoing income stream, some of which may be tax-free;
- Gifts of appreciated property may allow you to deduct the full fair market value of the property; the capital gains are not taxed; A bequest made at death is exempt from estate taxes, saving the estate close to half the amount of the gift. Gifts of an IRA can provide even more significant.

