



California-Nevada
United Methodist
FOUNDATION

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THE SKY IS THE LIMIT

when it comes to possibilities for your future. Whatever your family, financial or estate planning goal may be, we can help. There are numerous ways you can make a gift to your church and receive valuable benefits including increased income and tax savings.

If you have any questions, please contact us. Let us help you reach new heights with your goals!



WHAT ARE YOUR GOALS FOR THE PRESENT AND FUTURE?

Some of them may be big while others are small. Yet if you are like most of us, you would like some important basics.

THESE CAN INCLUDE:

SECURITY FOR YOU AND YOUR FAMILY

GROWTH AND PRESERVATION OF
YOUR WEALTH AND ESTATE

THE ABILITY TO LEAVE A LEGACY

IT IS POSSIBLE TO ACHIEVE ALL OF THESE GOALS WITH SOME PLANNING.

1

CREATE SECURITY FOR YOU AND YOUR LOVED ONES

Did you know there is a way to make a gift to your church while creating security for you and your loved ones? It's called a charitable gift annuity. What's more, it's as simple as transferring your low performing investments such as CDs and stocks to us in exchange for fixed lifetime payments.

You might be surprised at how much higher your income could be and your payment rate will never change.

2

REDUCE TAXES WHILE HELPING YOUR CHURCH AND YOUR HEIRS

A bequest of your IRA funds is one of the easiest ways to help future ministries while also reducing taxes for your estate and your heirs. By designating your church as the beneficiary of your plan, your estate can enjoy valuable tax savings. The full value of your gift will go to help further ministry. Rather than facing a high tax burden, your heirs may benefit from estate gifts of low taxed assets such as your home or stock.

3

GROW YOUR NEST EGG NOW AND IN THE FUTURE

Did you know that there is a way to make a gift to your church and receive income that could grow over your lifetime? A charitable remainder unitrust is an arrangement funded with your cash or appreciated assets. The most common unitrust will pay you income each year based on a percentage of the trust assets. Your income has the potential to increase over time with growth in the trust. This means more income for you and more remaining assets to help your church in the future.