



California-Nevada United Methodist FOUNDATION

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ADVANTAGES OF TOD CHARITABLE GIFTS

- **SIMPLE**—To make a TOD gift, you simply fill out a brief form provided by your financial or brokerage firm.
- **AVOID PROBATE**—The asset(s) passes directly to your church without going through the probate process.
- **SAVE TAXES**—The asset(s) will be removed from your taxable estate, saving potential estate taxes.
- **INEXPENSIVE**—There is no cost to complete the TOD form, and in most cases there are no legal fees, as there is no need to amend your will or trust.
- **REVOCABLE**—You retain complete ownership of the account while you are living, and you can modify or revoke your gift at any time during your life.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

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PLANNED GIVING BRIEF

A GIFT of a DIFFERENT SORT

Gift of an investment account
when it is no longer needed



Do you own stocks, bonds or mutual funds?
Would you like to make a gift to leave a
legacy and support your church?

If so, consider a **transfer on death (TOD)**
gifting strategy. With a TOD gift, you can name your
church as the primary or contingent beneficiary of the
brokerage account upon your passing.

TOD GIFTS ARE COST EFFECTIVE WAYS TO LEAVE A LEGACY

Ed and Robin wanted to leave a legacy gift that would support the mission of their church and ensure that they remained financially strong well into the future. In talking with their investment advisor about their planning goals, they found a simple solution—use a transfer on death (TOD) form to name their church as a beneficiary of a large mutual fund in which they were invested.

Because they jointly owned the account, the TOD beneficiary designation would ensure that they could both benefit from the mutual fund during their joint lives and that the survivor of the two of them would continue to own the mutual fund for the rest of the survivor's life. After both pass away, the mutual fund would be transferred to their church. Ed told us, "We really liked the idea of a TOD gift! It was simple to set up, and it lets us continue to use the mutual fund to meet our needs in retirement." We couldn't be happier with this giving strategy!"



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