



CALIFORNIA-NEVADA
United Methodist Foundation

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Personal Planning Newsletter

Spring 2026

Secure Your
Legacy With
**SMART
GIFTS**

Turn Financial
Growth into
**Lasting
Good**



www.canvumgiving.org
1350 Halyard Dr., West Sacramento, CA 95691



Use Your Stock's Growth for Good

One of the most meaningful ways to use your appreciated assets is by making a charitable gift. If you have publicly traded stock, you can transfer it to us. You will pay no capital gains on the transfer, we can sell it tax free, and you will receive a charitable income tax deduction for the present value of the stock.

You can make a lasting impact using your stocks.

Transferring stock is one of the easiest and most effective ways of maximizing the impact of your hard-earned assets. Contact us or explore our website to see even more strategic ways of using appreciated assets without the worry of capital gains.

Create a New Fixed Income Stream

When you fund a CGA with your QCD, you pay no income tax on the distribution. Instead, you will pay taxes each year on each payment, but paying taxes over the years is generally better than paying them on a lump sum distribution this year.

With this special CGA, you will not get a charitable tax deduction, but you will receive fixed payments for life. There are limits to how much of your QCD you can use for a CGA. Contact us to learn your payment rate and the current funding limit. There are options too, such as payments for you and your spouse. Keep in mind the IRA QCD funded CGA is so good, you can only create one once in your lifetime.

If you are 70½ or older, you can use your IRA qualified charitable distribution (QCD) to create an income stream that pays you for life. The payments are a feature of a charitable gift annuity (CGA). A CGA is an agreement where you make a gift to our organization, and we pay you back a fixed amount every year for as long as you live. We offer traditional CGAs which have their own benefits (ask us about these), but a CGA funded with a QCD is different.



Turn Tax Savings into New Income

Use your QCD to start a new
income stream.



You can combine your IRA qualified charitable distribution (QCD) once in your life with a charitable gift annuity (CGA) if you are 70½ or older. A gift annuity is an agreement between a nonprofit, like ours, where you make a gift, and we pay you a fixed amount each year for life. A traditional CGA is a wonderful option at any age and is not limited to once in your lifetime. It offers its own rewards, but a CGA funded with an IRA QCD might be a great one-time option. It turns an income tax burden into an income benefit. **Here's how:**

Contact us
to learn your
payment rate
and fixed annual
payment amount.



Direct your IRA
administrator
to distribute
your desired gift
amount to us.



You can fund a
CGA with your
QCD for yourself
or for you and
your spouse.



Ask us the dollar
limit this year for
your gift annuity
QCD, since it
changes each
year.

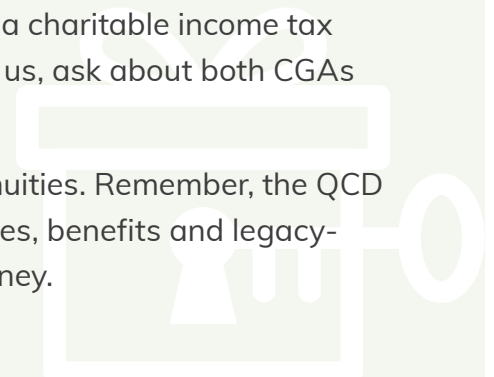


We agree to pay
you a fixed dollar
amount each
year for as long
as you live.

With a QCD CGA, you will not receive an income tax deduction, and you will pay income tax on the payments each year. However, it is usually better to pay taxes on annual payments than on one lump sum distribution this year.

You could also create a traditional CGA, which provides you with a charitable income tax deduction and possible capital gains benefits. When you contact us, ask about both CGAs and which one might be better for you.

Contact us to learn more about IRA QCDs and charitable gift annuities. Remember, the QCD CGA is so good, you can only do it once. Let us show you your rates, benefits and legacy-building tools to help you make the most of your hard-earned money.



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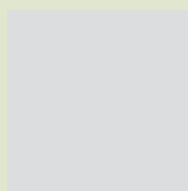
A Designation Worthy of **Celebration**



You can have a profound impact using your investment account as well as your checking, savings and IRA. These types of accounts allow you the opportunity to make a simple choice that will provide you with lasting peace of mind.

You can select your church to benefit from these accounts on your beneficiary designation form. It is an easy to complete form that allows you to pass important accounts to family, friends or nonprofit organizations like your church. Often you can complete the designation online — just list the individuals and organizations you want to benefit from the assets in the account when you no longer need them.

We always recommend you check with your attorney or wealth advisor before making any decisions. Contact us to learn how a beneficiary designation will give you cause for celebration.



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