CALIFORNIA-NEVADA
United Methodist Foundation
916-813-1974
www.canvumf.org

# Personal PLANNING NEWSLETTER

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## A Comfortable FUTURE

Fall 2026



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

# NEW *Comfort*, NEW *Joy*

Could you use some good news? Look back to look forward. Remind yourself of the difference you have made with your church. Lives have been changed. You have made an impact. But the past is only the beginning.

Want more good news? The best way to receive good news is to make good news. As you consider your past, plan your tomorrows. There are things you can do to make this year, and every day in it, full of good news. Do you know about these?

### CHARITABLE *Gift Annuity*

- fixed payments to you for life

### CHARITABLE *Remainder Unitrust*

- payments to you at a rate you choose

**Both offer you income tax and possible capital gains benefits**

Contact us to learn what rates are available for you and what choices you have. There are too many to list here! Use either one to start receiving benefits this year that can continue for as long as you live.



**THE BEST *News* IS THE *News* WE MAKE**

# CAN *My* IRA DO *That?*

Did you know if you are 70½ or older, you can turn your IRA into a new stream of payments for you? Funding a new charitable gift annuity will create an attractive, fixed rate payment every year for life. This opportunity is only permitted once in your lifetime.

**RATHER THAN TAKE AN *IRA distribution,* WHY NOT CREATE A NEW PAYMENT STREAM INSTEAD?**

Call us, then call your IRA account administrator and ask to transfer up to $55,000 in 2026 to our mission to fund a charitable gift annuity. Then your payments begin just like any other gift annuity. The only difference is, since these funds were never taxed, you will not receive an income tax deduction when you fund it, and your payments will be taxed as income. However, with a lifetime of payments ahead of you, you will love your new gift annuity.

**DEPENDABLE,**
***reliable,***
**UNCHANGING**



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# EASY, SIMPLE, *Effective*

Planning does not have to be complicated. You can make a profound difference in moments. In the time it took you to read this newsletter, you can provide for your family, friends and cherished causes.

Other than our homes, our largest assets are likely in financial institutions. For example, you may have funds in one or many of the following accounts:

- Savings
- Checkings
- Investment
- IRA (or other retirement account)

**BIG** *differences* **COME FROM SMALL** *actions*

Contact the administrator of your account(s) and ask for a payable on death form. You can complete this form and list who you want to receive the funds after you die. It takes only moments to complete. You can list family, friends and nonprofit organizations. While you should always check with your attorney, this form can be completed without the formality of a will. And you can change it any time you want.

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