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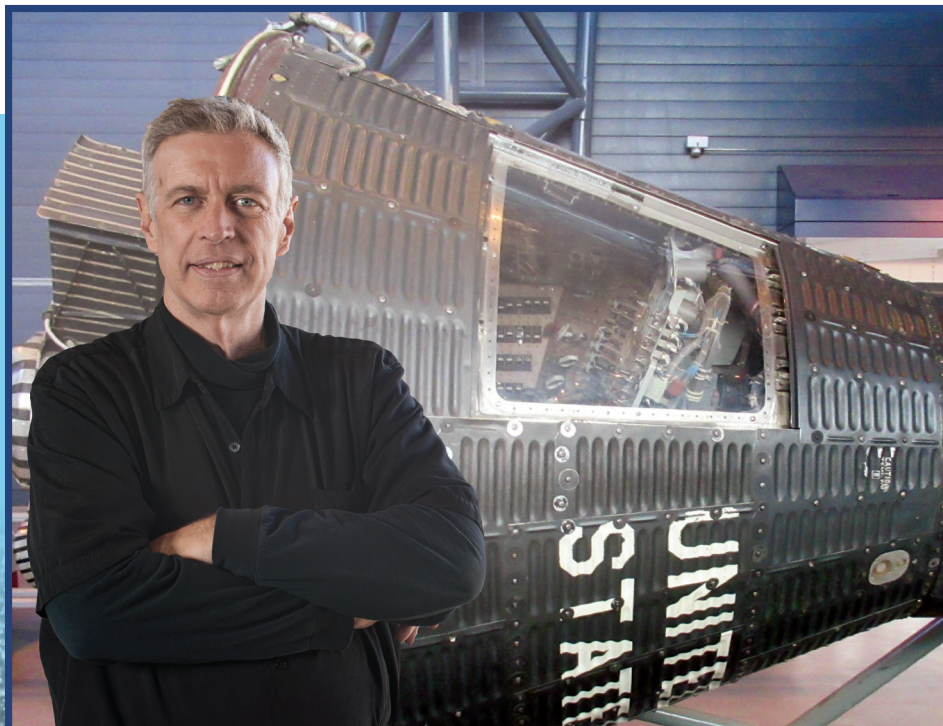


Personal **PLANNING** Newsletter

SPRING 2019

a legacy that stands

The Test of Time



Even though astronauts last took steps on the moon in 1972, the imprint from each of their steps remains today. What a tremendous legacy! Those footprints will stand as a reminder of an accomplishment for generations to come.

Establishing a Plan

This summer marks a milestone—the 50th anniversary of the Apollo moon landing. When astronaut Neil Armstrong took the first step on the moon, he famously stated he had taken **"one small step for man, one giant leap for mankind."**

What made the lunar landing possible? Historians credit President Kennedy and his May 1961 "moonshot" speech to Congress. In the speech, President Kennedy shared a vision of what could be achieved. He set clear goals and established a plan for how the nation could use its talents and resources to win the "space race."

When it comes to estate planning, you may have your own goals about how to provide for family and leave a legacy. In order to achieve those goals, you may want to apply some key principles from President Kennedy's moonshot speech.



Identify Your Goals.

President Kennedy established a clear but lofty goal—**"landing a man on the moon and returning him safely to earth."** When it comes to caring and providing for family, have you identified your own goals? If you are married, how do you want to provide for your spouse? If you have children, do you need a plan that spreads out an inheritance?

Think Big.

Have you ever heard the phrase **"moonshot thinking"**? It refers to an ambitious, even audacious, way of "thinking big." To reach the moon, President Kennedy explained that the United States would need advanced communication and weather observation technology. The moonshot led to the development of new innovations and changed the world in ways that make a big difference today. By including a gift to our organization in your estate plan, you too can make a difference.



Take Small Steps.

To win the space race, the president set forth smaller steps the nation could take to **achieve the larger goal**. Estate planning may seem daunting. To make planning easier, break the process into smaller pieces. You can start by contacting our office and requesting a FREE copy of our Estate Planning Guide. This guide will explain the estate planning process, breaking it down into smaller more manageable pieces.

Meet Your Priorities

Even though astronauts last took steps on the moon in 1972, because of a lack of atmosphere the imprint from each of their steps remains today and will for potentially 100 million more years. What a tremendous legacy! Those footprints will stand as a reminder of a tremendous accomplishment for generations to come.

If you are looking for a way to leave your own legacy, you can do so by leaving a gift to support your church. A popular way many people choose to support ministry is with an "endowed" gift. An endowed gift is a gift that is transferred to your church endowment and the principal of the gift is invested. Each year, they use the earnings from the investment to support ministry while continuing to invest the principal for future years.



With an endowed gift, we will continue to benefit from your gift year after year, and we will be able to use your gift to make a difference in the world. As with footprints on the moon, an endowed gift can help you maximize the impact of your legacy to ensure your generosity lives on for generations. Contact us to learn more about ways to structure an endowed gift, contact our office and ask to speak to one of our gift planning professionals.



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What Is Your **BACKUP PLAN?**

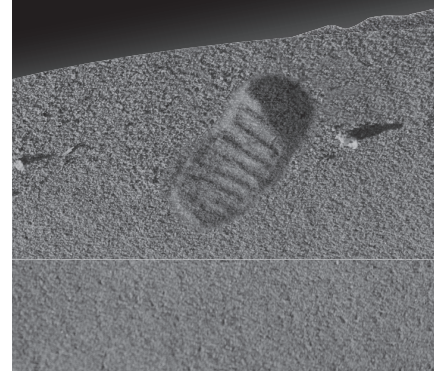
To put a man on the moon, NASA was constantly confronted with new challenges and needed to be prepared to address unforeseen situations.

For that reason, the scientists, engineers and mathematicians at NASA had numerous contingency and backup plans. If one system or piece of equipment failed, there was a backup to ensure the mission could continue as planned.

When it comes to estate planning, you may want a backup plan, including for determining who will inherit your retirement, investment and bank accounts. For example, you may want to leave your accounts to your spouse, if you are married, or another loved one. But what will happen if that individual is not available to inherit your accounts?

A solution is to obtain a "beneficiary designation" form from your bank or account custodian and name your loved one as the primary beneficiary and your church as a contingent beneficiary. This puts in place a plan to provide for your loved ones as well as a backup plan that has the potential to support ministry.

You can designate
a beneficiary on
many of your
accounts in just a
few minutes . . .
avoiding months or
years of probate.



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