



CALIFORNIA-NEVADA United Methodist Foundation

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PLANNED GIVING BRIEF

ENDOWING OUR FUTURE

It's easier than you might think.

WHY GIVE TO YOUR CHURCH ENDOWMENT?

The purpose of an endowment fund is to financially sustain the mission and work of a charitable organization. The principal of an endowment is kept intact and only the annual earnings, typically income and a portion of the capital growth, are used to fund current needs. Your church has established its endowment so that it can continue to carry on its important work in the years to come. You can make a significant contribution to further the mission of your church...and it's easier than you might think. Here are a number of charitable gift and estate planning strategies that can benefit you and build your church endowment.

CHARITABLE LIFE ESTATES

Do you own a home, vacation property or farm? A gift of your property is one way you can help build your church's endowment. With a charitable life estate, you can make your gift to your church today and continue to use and enjoy the property during your lifetime. This gift is as simple as deeding your property to your church with a provision in the deed that permits your continued use. You are entitled to a charitable income tax deduction, and the property is removed from your estate. In the future, your church can sell or make use of the property to support the mission of your church.

BEQUESTS

A bequest is one of the easiest gifts you can make to sustain your church's endowment. To most people, the most familiar type of bequests are gifts made through a provision in a will or trust. You can make a bequest of a dollar amount, a specific asset, or a percentage of or the residue from your estate. Our supporters like the fact that bequests are gifts that are made through an estate plan and are revocable, meaning you still have the opportunity to change your mind.

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.

CHARITABLE LIFE INCOME PLANS

Charitable life income plans such as the charitable gift annuity and charitable remainder trust enable you to make a future gift to endow the ministry of your church while protecting or enhancing your current financial security. In exchange for your charitable gift, you reap multiple benefits:

- Receive lifetime payments (for you and your spouse).
- Generate a current income tax deduction.
- Bypass all or a portion of the capital gains on appreciated assets.
- Make a future gift upon your passing to endow the work of your church.

BENEFICIARY DESIGNATIONS

In addition to "traditional" bequests made through your will or trust, you can use beneficiary designations to endow the work of your church. It is typically easier to make a gift by completing a beneficiary designation form provided by your account administrator than it is to visit your attorney and update your will. The benefits of making a gift to our endowment through a beneficiary designation are numerous:

AVOID PROBATE—The assets you give away will not go through the costly and time-consuming probate process.

TAX SAVINGS—If you have a taxable estate, your estate will receive a charitable deduction, saving estate taxes, and will avoid income taxes on certain assets such as retirement plans and annuities.

REVOCABLE—Beneficiary designations are revocable and can be modified at any time during your lifetime.

EASY TO DO—Simply fill out a brief form provided by your account administrator.

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