



California-Nevada
United Methodist
FOUNDATION

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Personal PLANNING Newsletter

Fall 2021

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FOOD FOR THOUGHT

Plan for
your future
like you'd shop
for healthy foods



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1350 Halyard Dr., West Sacramento, CA 95691 888-789-7374



A GOOD LIST

Any trip to the store is better when we plan ahead. When we make a shopping list first, we usually buy only what we need and are less prone to impulse purchases. By planning ahead, we can time our trip with good sales, coupons and flyers so we can get what we need at the best price. Planning pays.

The end of the year is a great time to plan for next year and for the rest of our lives. This is a wonderful opportunity to look at ways to save taxes. As you do, you can also look ahead and ensure future years provide enough for you, your family and the causes you cherish. And, when all is added together, you will leave a legacy and be remembered for all you have done.

We help people like you every day and we have excellent planning tools to help you achieve your goals. You would not go to the store without knowing what you want. Don't live another day without thinking about your future and that of your family. We have fresh ideas to help you.

As you celebrate friends and family during the holidays, consider how you want to provide for them even as you save money for yourself and your spouse. If you wish to include your church in your plans, we have tools to help you provide for your family while giving you significant tax benefits. Call or email us. We have everything you need, and unlike the store, all our tools are available at absolutely no cost (or obligation) for you. No coupon is ever needed.

Don't spend money you don't have to spend.

You don't shop when you are hungry. Don't wait until April to look at your taxes.



We are like your friendly produce manager at your local store.

We know what's in season, and we can make recommendations knowing what you like.

WE PUT THE MILK UP FRONT

Ever wonder why the store puts the milk, eggs and other staples along its back wall? They place them there because they know those are the products you need most often. The grocer wants you to impulse buy the other products you see as you walk to the back of the store.

While we don't sell milk and eggs, we do have tools and ideas to help you and make your life better. However, we put our staples and everything you need up front. We value your time and want to give you our best, conveniently and with no clutter. We make it easy for you.

While we offer many tools, tips and ideas, here are a few of our ideas to show how impactful but quick and simple planning can be.

- ✓ Think about your pay-on-death beneficiary for your checking, savings, IRA and investment accounts. You can designate a family member or charity to receive funds in the account without going through probate.
- ✓ Our charitable gift annuity offers you high, fixed, reliable payments that last your whole life.

Call or email us. We give you our best ideas right out front. You never have to search. Imagine the peace of mind you will have.



Everything we do for you **comes with no cost or obligation.**



The holidays are a perfect time to give yourself the peace of mind that comes with a little planning.

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PAPER, PLASTIC OR IRA?

A few decades ago, we started hearing a new phrase at the store: paper or plastic? For as long as anyone could remember, there was no choice. Paper was it. Today, many places encourage us not to use paper or plastic but to bring our own bags to the store.

Times have changed. And now something that has been the same for decades has also changed. Your IRA has a new use. It will give you fresh choices and innovative opportunities. If you are aged 72 or older, you know you must withdraw a certain amount from your IRA each year. Now you can transfer (never take the distribution yourself) funds from your IRA to a charity such as ours, and satisfy your required minimum distribution up to \$100,000.

You won't receive an income tax deduction, but you can be joyful knowing you can give to ministry. What will you do with your IRA? Take the distribution and pay taxes or direct it to your church or charity and do a world of good?



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