

WHY GIVE TO OUR ENDOWMENT?

The purpose of our endowment fund is to financially sustain the mission and work of First United Methodist Church of Gilbert. 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. We have established our endowment so that we can continue to carry on our important work in the years to come. You can make a significant contribution to further our mission- - it's easier than you might think!

Here are a number of charitable gift and estate planning strategies that can benefit you and build our endowment.

BENEFICIARY DESIGNATIONS

In addition to "traditional" bequests made through your will or trust, you can use beneficiary designations to endow our work. 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. Here are some of the more common assets that pass to us through beneficiary designations:

- Checking, savings and/or mutual fund accounts.
- Retirement accounts such as an IRA, 401(k) or 403(b).
- Life insurance policies.
- Commercial annuities.

The benefits of making a gift to our endowment through a beneficiary designation are numerous:

AVOID PROBATE-The assets you give away via a beneficiary designation 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. The combined tax savings could be upwards of 60%.

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.

CHARITABLE LIFE ESTATES

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

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 our work while protecting or enhancing your current financial security.

If you have low-yielding assets and are seeking higher payments, a charitable life income gift may be worth your while to explore. 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 our work.

For more information contact the Endowment Committee Chairperson today!

BEQUESTS

A bequest is one of the easiest gifts you can make to sustain our 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, a percentage of or from the residue of 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.

WE CAN HELP!

To learn more about how you can make a significant gift to endow our future, please contact the Endowment Committee Chairperson. They would be happy to talk with you and provide a free illustration of the benefits of one or more of these plans for you.



HOW CAN DSUMF HELP YOU?

- ☐ Please contact me with more information about making a gift to FUMC of Gilbert's endowment.
- ☐ I have already included FUMC of Gilbert in my will or trust.
- ☐ Please have DSUMF send me a FREE estate planning guide.

The best way to contact me is by:

☐ Email ☐ Mail ☐ Telephone

Name

Street

City

State/Zip

Phone

E-mail

(All inquiries are treated with complete confidentiality.)

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.

DSUMF is FUMC of Gilbert's fund custodian and a resource for information on many types of planned gifts.

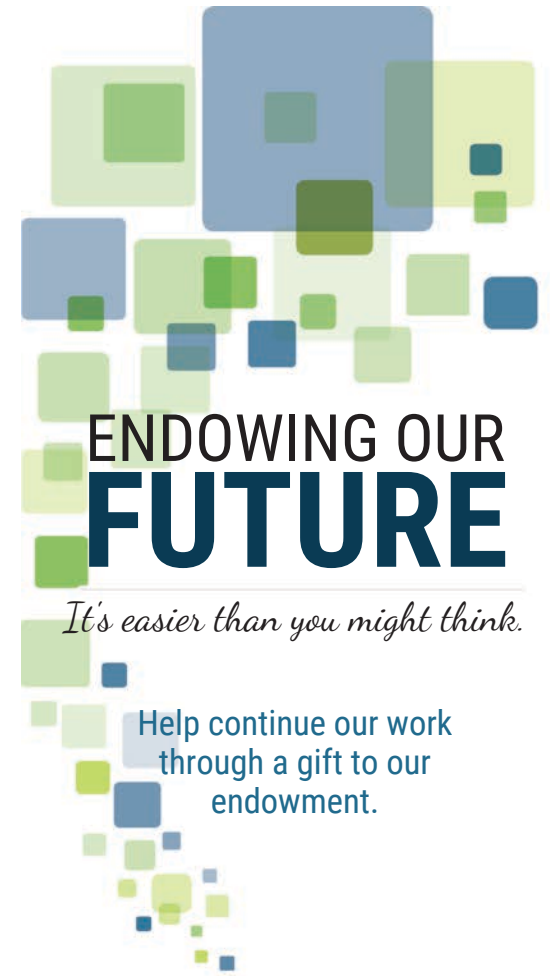


Desert Southwest

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Help continue our work
through a gift to our
endowment.

