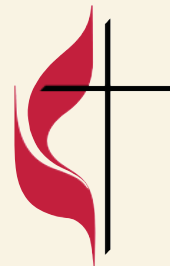


Legacies



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Spring 2009

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Retired schoolteacher Geneve Castles died more than ten years ago. But every year she helps students from her church go to college.

How is this possible? It's because of the bequest to the church Ms. Castles left in her will. With a little planning and a caring spirit, she is able to provide scholarships for members of her church who could otherwise not afford higher education.

Ms. Castles was a faithful member of First United Methodist Church in Monroe. She lived a modest lifestyle and never married. Her substantial gift came as a surprise to her pastor, Rev. Larry Stafford.

The idea of helping needy students was delightful news. "Wow! Who knew that Ms. Castles was planning such a gift!" Rev. Stafford said.

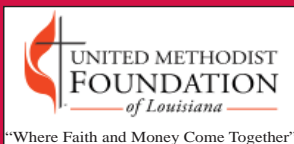
"This gift was a way for Ms. Castles to make a difference in the lives of

the people who were important to her. She loved the church and the kids and realized the need for higher education," continued Rev. Stafford.

The church established the Geneve Castles Endowment Fund through the United Methodist Foundation of Louisiana and formed a committee to select the scholarship recipients each year. Reverend Stafford explained that the main criteria are church membership and financial need. The recipients must live up to their academic ability to continue receiving funds.

The principal of the fund is never touched, but the income from it has helped eight to ten students per year attend college since it was formed.

As a result of Ms. Castles' bequest, her memory will never be extinguished. Her gift reminds us all that we, too, can make a difference in the lives of others.



"Where Faith and Money Come Together"



ESTATE AND WILLS PLANNING

Wishes Can Come True

Planning Ahead for the Future is Crucial

The ultimate form of communicating our wishes for the future is our written will or estate plan. Throughout history, wills have been used to fulfill and sustain the wishes of the persons who created them. When we fail to have a will, we miss a wonderful opportunity to share our wishes with our family, friends and the causes that are important to us.

Without a will, the state tries to determine what our wishes are and tries to act on them – often at great expense. The state does not always get it right. Those who are important to us may miss out on all that we planned for them.

Take a moment to consider your legacy. Don't let the state decide what you would have done. Like a great song, write the notes down (with your attorney) so your melody might be enjoyed for generations to come. A well written plan reflects your intentions to your family, friends, and your United Methodist Church.



Beyond a Will: Other Things You Should Consider

There are other simpler documents you should consider in creating your estate plan:



Power of Attorney for Health Care

A legal document authorizing someone you trust to act on your behalf regarding your health care. Consult your estate planner on how to create this document.



Letter to Family

A letter to your family to let them know where you keep your financial information, your final wishes, etc. Creating a document that contains this information can be a valuable way of providing the guidance that your loved ones may need.

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Resources for Unretirees

Dear Savvy Senior,

With the economy in the tank and my nest egg dwindling, I've had to cut back my monthly withdrawals to keep from running out of money. Now I need to find a job to help make ends meet. What can you tell me?

Looking for a Job

Dear Looking,

Unfortunately, the economic downturn has forced many retirees back into the workforce. To help you job hunt, there are a variety of resources available today that cater specifically to older workers. Here are some to try.

Web Resources

Whatever your skills or working interest (full-time, part-time, temporary or seasonal) there's a growing array of online employment networks that can help you connect with companies that are interested in hiring seniors. Some top sites to visit are:

- retirementjobs.com: This is the largest and most comprehensive career site for people over age 50. It provides job listings, job-seeking tips and help with résumé writing.

- enrge.us: For retired government employees, this site (www.enrge.us) matches federal, state and local government workers with private companies seeking to fill contract jobs in all kinds of fields.

Other 50-plus job-seeking sites worth a look are seniors4hire.com, workforce50.com, retiredbrains.com, retireeworkforce.com, wiserworker.com and seniorjobbank.com.

Government and Community Programs

The U.S. Department of Labor SCSEP offers lower-income folks, age 55 and older, access to training and part-time job placements in a wide variety of community service positions. To learn more, visit www.doleta.gov/seniors or call 877-872-5627.

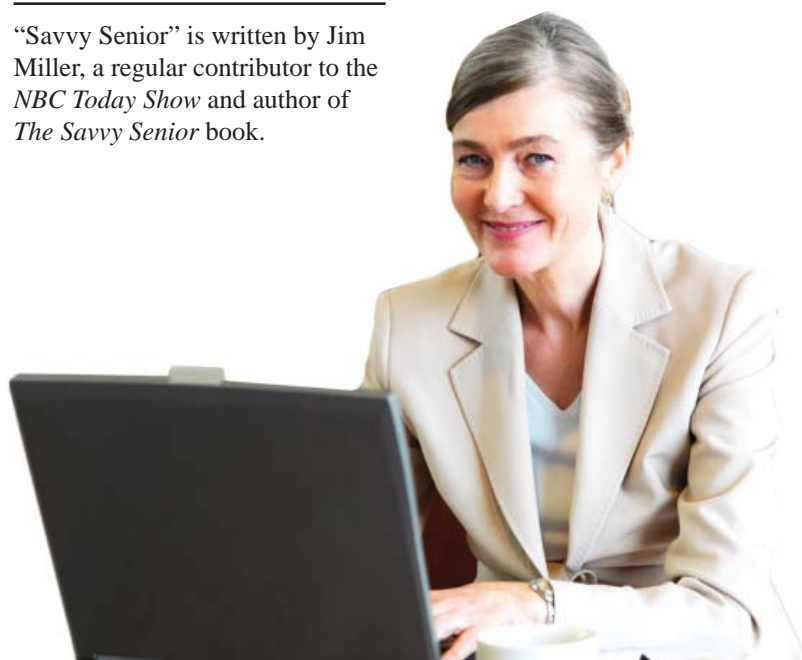
In addition, some states, communities and local nonprofits may offer their own senior employment programs. To find out what may be available in your area contact the eldercare locator at 800-677-1116.

Temporary Part-Time

If you're looking for temporary part-time work, a great option to consider is the U.S. Census Bureau that is currently recruiting census takers for the 2010 census. For more information go to www.census.gov/2010censusjobs.

Note that going back to work may impact your Social Security benefits. For more information on your Social Security payments, please call the Social Security help line at 800-772-1213.

"Savvy Senior" is written by Jim Miller, a regular contributor to the *NBC Today Show* and author of *The Savvy Senior* book.





"Where Faith and Money Come Together"

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FOUNDATION NEWS

Creating a Culture of Generosity: Foundation Hosts Two Stewardship Workshops

Continuing its mission to encourage giving within the United Methodist Church, the Foundation hosted two stewardship workshops this spring. Led by noted author and church growth consultant Clif Christopher, more than 120 clergy and laity learned how to create a culture of generosity within their church congregations.

The workshop was based on Christopher's latest book, "Not Your Parents' Offering Plate," and discussions included how the culture of giving is changing, top reasons people give, the generational differences in giving and how to create a generous culture in challenging economic times. More than half of the attendees said the workshop exceeded their expectations and 91 percent said they acquired new ideas to use now in their church stewardship programs.

If your church missed this informative and practical workshop, contact the Foundation office for details.



Clif Christopher shares important trends in religious giving as part of the "Creating a Culture of Generosity" workshop.

What's Your Excuse for Not Having a Will?

- "It's costly."
- "I hate all that legal mumbo-jumbo."
- "My estate is too small."
- "I'm just too busy."

The absence of a will makes settling your estate more costly, and most Americans possess more in assets than they realize. Preparing a will is your opportunity to articulate your wishes, your values and your legacy.

Need help? Contact us for our free will kit or download one from our website.



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WHAT LEGACY WILL YOU LEAVE?

- Please send me a brochure(s) on wills and bequests:
 - "What Legacy Will You Leave?"
 - "Voice of a Legacy"
 - "Will Your Will Be Known?"
- I would like to talk to someone about a leaving a charitable bequest to the church in my will.
- Please send me the free will kit.

Name _____

Address _____

City/State/Zip _____

E-Mail _____

Phone _____

Church _____

**WILL THERE BE A PEW
WAITING FOR YOUR
HEIRS?**



BEQUESTS

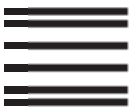
- the easiest gift to give
- a major source of financial support for your church
- helps ensure the church's continued ministry.

**REMEMBER
YOUR
CHURCH IN
YOUR WILL.**

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