



Planned Giving Overview

The goal of planned giving is to help donors plan their estates and charitable giving in ways that benefit both family and the church. The federal tax code allows for several trusts and gift agreements that are used in making these planned gifts to charity and that provide some tax benefits for donors. Therefore, the study and practice of planned giving is twofold. It involves knowledge of people and their needs as well as knowledge of taxation and the gift agreements available to fill those needs.

I have reviewed your brochure on Planned Giving and:

- I would like to speak with someone who can provide additional giving information.
- I would like to receive information on other charitable giving methods.

Name _____

Street _____

City _____

State/Zip _____

Home Phone _____

Work Phone _____

E-mail _____

(Please complete and return. All inquiries are treated with complete confidentiality.)

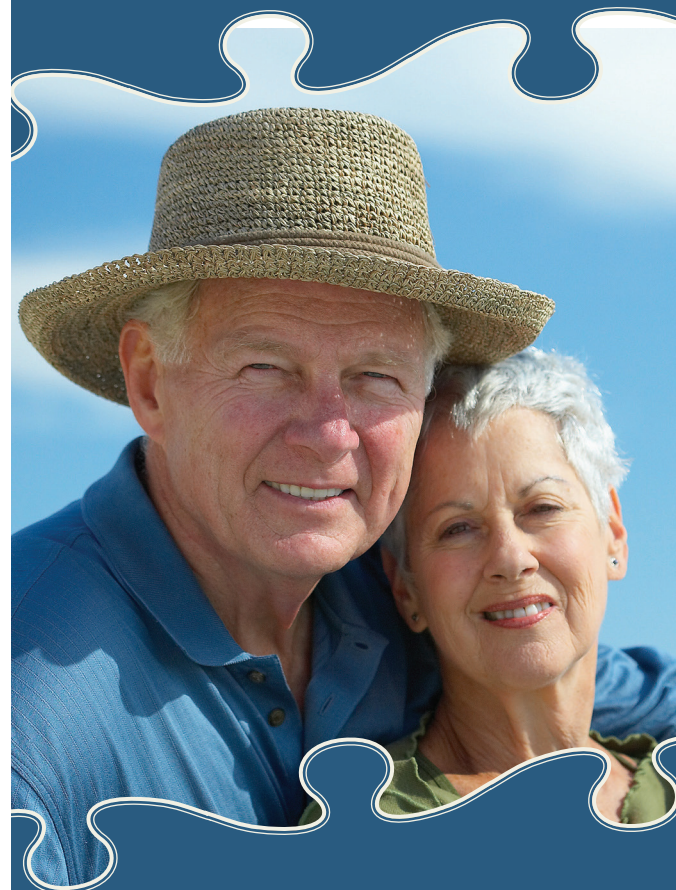


8337 Jefferson Hwy.
Baton Rouge, LA 70809

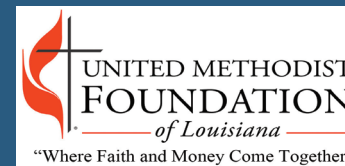
225.346.1535
www.umf.org

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Putting the Pieces Together



A Guide to Planned Giving



YOUR GIFT	YOUR GOAL	HOW IT WORKS	YOUR BENEFITS
Bequest	<ul style="list-style-type: none"> • Maintain control of your assets during life • Make a gift to church at your death 	Designate a United Methodist church or institution as the beneficiary of your asset by will, trust or other instrument.	<ul style="list-style-type: none"> • Estate tax charitable deduction • Life use and ownership of your property
Charitable Gift Annuity	<ul style="list-style-type: none"> • Receive fixed income for life • Avoid capital gains tax on the sale of your appreciated property • Receive a charitable deduction now 	Transfer your cash or appreciated property to the Foundation in exchange for our promise to pay you fixed income (with rates based on your age) for the rest of your life.	<ul style="list-style-type: none"> • Charitable tax deduction • Fixed income for life • Partial bypass of capital gain • Possible tax-free payments
Charitable Remainder Trust (CRT)	<ul style="list-style-type: none"> • Use appreciated property without paying capital gains tax • Enjoy regular income for life or a term of years • Receive a charitable deduction now 	Transfer your cash or appreciated property to fund a trust. The trust sells your property tax-free and provides you with income for life or a term of years.	<ul style="list-style-type: none"> • Charitable tax deduction • Income for life or a term of years • Possible income growth over time • Avoidance of capital gains tax
Beneficiary Designation	<ul style="list-style-type: none"> • Maintain control of the account or policy during life • Make a gift to your church at your death 	Designate your church as the beneficiary of an insurance policy, bank account or retirement account.	<ul style="list-style-type: none"> • Easy to do; simply contact your account or policy holder • You can change it at any time • Keeps your gift private until you want the beneficiary to know
Life Estate	<ul style="list-style-type: none"> • Remain in your home for life. • Receive a charitable income tax deduction now 	Donate house or property to the Foundation but retain the right to use it during your life.	<ul style="list-style-type: none"> • Charitable tax deduction • Lifetime use of property

