

Planned Giving

What will be your Legacy?



Building the Church for generations to come

A planned gift requires more thought and intention than writing a check or clicking “donate here.” Planned gifts are an opportunity leave a legacy. Their many forms depend on a donor’s personal and philanthropic goals, and include:

- Gifts you can make now
- Gifts you can defer until a later time
- Gifts that provide a lifetime income for the donor

➤ **Gifts you can make now:**

- Appreciated stock – avoid capital gains taxes and receive an immediate income tax deduction.
The Foundation liquidates stock at no cost as a courtesy to your ministry.
- Donor Advised Fund through the Foundation – immediate income tax deduction and a vehicle to practice philanthropy on a regular basis, like a mini “family foundation”
- Life insurance
- Retirement plan

➤ **Gifts you can defer until a later time:**

- Bequest through a will or codicil to an existing will
- Life Insurance
- Charitable Trust
- Retirement plan (as a beneficiary)

➤ **Gifts that provide a lifetime income:**

- Charitable Remainder Annuity Trust
- Charitable Remainder Unitrust



The United Methodist Foundation of Western North Carolina, Inc. does not provide tax or legal advice.

We offer suggestions and scenarios for illustrative purposes only.

Please consult your attorney or personal financial planner before engaging in one of these options to determine which best fits your personal financial situation and philanthropic goals.

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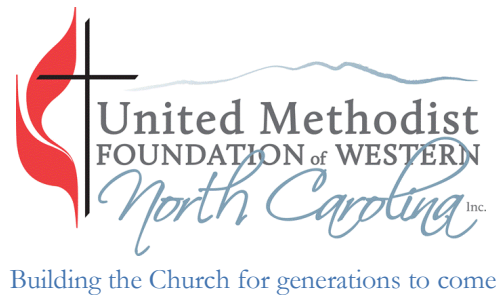
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Five-Year Strategy

For Planned Giving



The Five-Year Planned Giving Strategy is designed for United Methodist churches and related institutions. It can be adapted to your current stage in the planned giving process.

Year One:

- Emphasize the possibilities through bi-annual presentations to leadership
- Encourage leaders to set the pace, and to provide testimonials to encourage other giving
- Include “one-liners” in your publications for people to support the church in their estates
Example: “Have you remembered Grace UMC in your estate planning?”
- Place planned giving articles in your newsletter (at least) quarterly
- Plan two seminars on Planned Giving

Year Two:

- Repeat bullet points 1-4 from Year One
- Send two planned giving mailings to your constituency

Year Three:

- Repeat bullet points 1-4 from Year One
- Plan and celebrate a Legacy Sunday observance (often around All Saints’ Sunday)
- Include an “Endowment/Planned Giving Moment” in worship, using personal testimonies of those who have included the church in their estate plans
- Distribute two Endowment newsletters: Introduction (winter), Testimonies (spring)
- Send three planned giving mailings to your constituency
- Plan four seminars on Planned Giving



Year Four:

- Repeat bullet points 1-3 from Year Three
- Distribute three Endowment newsletters: Introduction (winter), Testimonies (spring), adding one with the theme “Ways I can Give through my Estate”

“One gives freely, yet grows all the richer; another withholds what he should give, and only suffers want.”

Proverbs 11:24

Year Five:

- Assess the previous four years’ strategies to determine what worked and what did not
- Once you have completed your program evaluation, determine your strategy for the next few years

Thank you for the opportunity to be in ministry with you!