

What Would You Give To Be the Answer To Someone's Prayer?

*"A gift opens the way
and ushers the giver into the
presence of the great."*

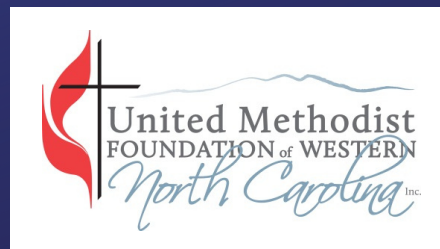
Proverbs 18:16

Your Church Name
United Methodist Church
is a partner of the United
Methodist Foundation of
Western North Carolina.

Learn more

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Gift Planning

Creating a Thoughtful and Unique Legacy

Your Church Name
United Methodist Church

There's a Gift Plan for Your Goals...

He directs charitable distributions to church from his IRA; count as part of required minimum distribution and reduce taxable income dollar-for-dollar.

She revised her will to leave 10 percent of estate to the church.

She funded a Charitable Remainder Unitrust with \$500,000 of appreciated stock. Receives annual income of 5% of the value (\$25,000 in first year). Can add more funds any time. Upon her death, remaining balance will pass to her church.

He opened a Donor Advised Fund with \$1,000; tax-free investment growth means more to give to the church and other causes.

He named church as beneficiary on his life insurance policy.

He donates appreciated stock through the Foundation; avoids capital gains taxes and deducts the gift on his taxes.

She funded an endowment to support local missions.



WHY GIVE STOCK?

Joan wants to give \$100,000 to her church. She owns some stock valued at \$100,000 (\$90,000 of that is long-term capital gain).

Gift planning takes intention, but doesn't have to be complicated.

Some gifts can be funded in this life and provide you, the donor, with benefits such as tax breaks, lifetime income, and the ability to preserve assets for heirs.

All this, as well as the intangible gift of providing generously for your church and other ministries.

	Option A - Sell stock & give cash proceeds	Option B - Gift stock to church through the Foundation
Current stock value	\$100,000	\$100,000
Capital gains tax (Fed 15%) + NC (5.25%)	\$18,230	\$0
Amount of Gift to Church	\$81,770	\$100,000

Pro tip: Funding your gift with appreciated stock allows you to maximize your personal benefits while providing generously.