

GIFTS YOU CAN MAKE NOW

YOUR GOAL	YOUR GIFT	HOW TO GIVE	YOUR BENEFITS
Make a quick and simple gift	OUTRIGHT GIFT	Donate cash, securities, or personal property	Income tax deductions for people that itemize; avoidance of any capital gains tax; good way to leave a legacy
Make a gift that allows flexibility and your input on how funds will be used	DONOR ADVISED FUND	Create an agreement where the Foundation manages assets; you suggest beneficiaries	Immediate income tax deduction, option to provide input on how funds will be used
Make a large gift and avoid capital gains tax	STOCK AND MUTUAL FUND GIFTS	Donate shares of stock certificates, bonds, or part of a mutual fund account	Tax advantage on capital gains and appreciated stock
Make a large gift with little cost to yourself	LIFE INSURANCE GIFT	Give an old or new policy with your church or favorite ministry named as beneficiary	Current income tax deduction, possible future deductions
Avoid the twofold taxation on retirement plan assets	RETIREMENT PLAN GIFT	Name your church or favorite ministry as beneficiary of all or part of the remaining assets after your lifetime	Avoidance of heavy taxed gift to heirs
Avoid capital gains tax on the sale of a home or other real estate	REAL ESTATE GIFT	Donate the property or sell it at a bargain price	Immediate income tax deduction and avoidance of capital gains tax
Make a donation from your IRA if you are 70 1/2	IRA CHARITABLE ROLLOVER	Donate all or part of your required minimum distribution (RMD) to your church or favorite ministry	Will reduce your taxable income

GIFTS YOU CAN DEFER

Defer a gift until after your lifetime	BEQUEST IN WILL	Name your church, favorite ministry, or the Foundation in your will	A donation exempt from federal estate taxes
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LIFE INCOME ARRANGEMENTS

Supplemental income that will keep pace with inflation	CHARITABLE REMAINDER UNITRUST	Create a trust that pays a percentage of the trust's assets, valued annually	Immediate income tax deduction, annual income for life that has potential to increase
Supplement income with fixed annual payments	CHARITABLE GIFT ANNUITY	Enter into a contract that pays you fixed payments annually	Current and future savings on income taxes; fixed payments for life

LEGACY GIVING OVERVIEW

Giving to your church can be done either directly through your gifts of time, talents, or treasures, or through a gift model that can provide tax benefits and even income. This brochure provides a quick overview of planned giving options. Look and see the many ways you can give to your church, favorite mission or ministry, or even the Foundation. For more detailed information, please visit our website, or contact us by email, telephone, or using the form attached. We are available to help assist you and your family.

Need more information?

You can find more information about the Wisconsin United Methodist Foundation, our services, and planned giving options on our website (www.wumf.org) or on Facebook (facebook.com/wumf). If after reviewing this brochure you would like to speak with someone who can provide you with additional information, please let us know!

Call, email, or visit our website. Or you can complete, cut off this panel, place it in an envelope and mail it to us. (All inquiries are treated with complete confidentiality.)

- Bequest
- Charitable Gift Annuity (CGA)
- Charitable Lead Trust
- Charitable Remainder Unitrust
- Donor Advised Fund
- IRA Charitable Rollover (RMD)
- Life Insurance Gift
- Outright Gift
- Real Estate Gift
- Retirement Plan Gift

Name _____

Street _____

City _____

State _____ Zip _____

Give to your passions now and long after you're gone

Giving of your time, talents, and treasures reflects a grateful heart that wants to give back a portion of what God has given you. God has also blessed you with areas of interests and passions for which you volunteer, give money, and pray. But what happens to those areas after you die?

If you set up a planned gift now, your church, favorite mission or ministry, or even the Foundation will receive those funds well after you are gone.

Your gift will sustain current ministries and create future programs while reflecting your faith and values.

You can integrate your gift with your estate plan and maximize your gifts to both charity and family.

The mission of the Wisconsin United Methodist Foundation is to assist the ministries of United Methodists in Wisconsin through lifelong financial stewardship.

HOW TO LEAVE A LEGACY



**Address: 750 Windsor Street,
Suite 305
Sun Prairie, WI 53590**

**Phone: 608-837-9582
Email: wumf@wumf.org
Web site: www.wumf.org**