

A Donor's Story

Joe and Anna have been faithful supporters of the Foundation. They believe it is important to support the Grants Fund for developing new and creative ministries in the churches throughout the Wisconsin Conference of the United Methodist Church.

"We believe the Foundation is truly helping others and that it is important to partner with them to make a difference," said Joe. He added. "For that reason, Anna and I have made gifts over the years to help others."

"Joe and I have been careful over the years and have accumulated some resources," added Anna. "We plan to be generous with family and we have the ability to be generous with the church and other charities."

After talking it over, Joe and Anna decided to leave a bequest in their will. Their attorney took the simple language available from the Foundation and included a nice bequest in support of their favorite ministries.

What will your legacy be?

What else can the Foundation do for your church?

- ◆ **Investment Services** – Professionally managed with church appropriate investments
- ◆ **Endowment Services** – Permanent funds for mission and ministry
- ◆ **Stewardship Services** – Training and consulting regarding growing generous givers, and stewardship tools and campaigns
- ◆ **Capital Campaign Services** – Assistance in raising money for building, ministry, and debt elimination
- ◆ **Grants** – Support for starting new and creative ministries
- ◆ **First Mortgage Loans** – Low interest, flexible terms for building, renovation and refinance

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

Contact the Foundation to host a Planned Giving Seminar for your congregation. We would love to help people learn the different ways they can give to support your life-giving ministries.

PLANNED GIVING



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

About Planned Giving



What will your legacy be?

Planned giving involves providing for a future gift through your financial and estate plans. You can take care of you and your loved ones and provide for the ministries closest to your heart.

Here are some types of planned giving:

Wills and Bequests

Have you included the church in your will or considered the ways to give in addition to cash? Our staff will lead a Planned Giving Seminar, hosted in your church. There is no charge for this seminar!

Stocks, Bonds and Mutual Funds

A gift of securities, including stocks or mutual funds, is an easy way for you to make a gift. By giving your appreciated securities, you avoid paying capital gains tax that would otherwise be due if you sold these assets. By using the Foundation, you also avoid a commission or selling fee and 100% of the proceeds of the sale of your stock will be sent to the church or ministry you designate.

**"The more you give,
the more comes back to you.
God is the greatest giver in the universe.
God won't let you out give Him.
Go ahead and try.
See what happens." ~Randy Alcorn**

Retirement Assets

Retirement assets, such as a gift from your IRA, 401k, 403b, pension or other tax deferred plan make excellent gifts. Enhance the ministry of your church or another ministry through an outright gift or the establishment of a permanent endowment.

Persons 70-1/2 or over may make tax-free gifts of up to \$100,000/year from an IRA. You can give a direct gift of your Required Minimum Distribution (RDM) or establish an endowment from it.

Or, you can list the church or another ministry as a percentage beneficiary of your retirement assets.

Real Estate

Real property (a home, rental or vacation property, vacant land, farm, ranch or commercial property) can make a great gift. If you own appreciated real estate, you can avoid paying capital gains tax by making a gift to the Foundation for the benefit of your church, favorite ministries or charities.

Life Insurance

A life insurance policy is an excellent gift, especially if your policy is no longer needed or will no longer benefit your survivors.

Donor Advised Fund

You can make a gift now, and receive your charitable tax deduction immediately. Then take your time in distributing your gift proceeds to the qualified charities of your choice.

Life Income Gifts

A Life Income Gift is an arrangement that provides you or others with income and leaves a gift for charity in the future. These gifts may also entitle you to a tax savings.

◆ Charitable Gift Annuity

You transfer cash or appreciated property to the Foundation in exchange for a fixed income annuity payment (with rates based on your age) for the rest of your life. A portion of your annuity payment will also be tax-free until you reach your life expectancy. The Foundation requires a minimum of \$2,000 to start.

◆ Charitable Remainder Unitrust

You transfer cash or appreciated property to fund a charitable trust. The trust sells your property tax free and provides you with variable income payments for life or a term of years. The Foundation requires a minimum of \$50,000 to establish a Unitrust.