

I have reviewed your brochure on Planned Giving and I would like to speak with someone who can provide additional information on:

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

Name _____

Street _____

City _____

State _____ Zip _____

Telephone _____

E-mail _____

(Please complete, cut off panel, place in envelope and mail to us. All inquiries are treated with complete confidentiality.)

This publication is prepared for the information of our friends and donors and illustrates general concepts and ideas in tax and estate planning. The articles are not intended as legal services or advice. You should, accordingly, consult with competent tax and legal professionals as to the applicability of any items to your personal situation. Minnesota United Methodist Foundation.



Act Today!

Thank you for considering a special gift to your church or the Minnesota United Methodist Foundation. Through careful planning, there are many ways to make a cost effective gift, perhaps even consider a larger gift than you originally thought possible.

If you have questions or would like some help, we welcome the opportunity to assist you.

Thank you for your faithfulness, thoughtfulness and generosity.

MINNESOTA
UNITED METHODIST



FOUNDATION

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“As long as the earth endures,
seedtime and harvest,
cold and heat,
summer and winter,
day and night
will never cease.”

Genesis 8:22 NIV

Ways to
Give

Minnesota United Methodist Foundation
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HOW TO GIVE	YOUR GOAL	HOW IT WORKS	YOUR BENEFITS
OUTRIGHT GIFT	Make a quick and simple gift	Donate cash, securities or personal property	Income tax deduction; avoidance of any capital gains tax
BEQUEST IN WILL	Defer a gift until after your lifetime	Name your church or favorite ministry in your will	A donation exempt from federal estate taxes
LIFE INSURANCE GIFT	Make a large gift with little cost to yourself	Give an old or new policy with your church or favorite ministry named as beneficiary	Current income tax deduction, possible future deductions
RETIREMENT PLAN GIFT	Avoid the twofold taxation on retirement plan assets	Name your church or favorite ministry as beneficiary of all or part of the remaining assets after your lifetime	Avoidance of heavily taxed gift to heirs
REAL ESTATE GIFT	Avoid capital gains tax on the sale of a home or other real estate	Donate the property or sell it at a bargain price	Immediate income tax deduction and avoidance of capital gains tax
CHARITABLE REMAINDER ANNUITY TRUST	Secure a fixed and often improved income	Create a charitable trust that pays you a set income annually	Immediate income tax deduction and fixed income for life
CHARITABLE REMAINDER UNITRUST	Create a hedge against inflation over the long term	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
CHARITABLE GIFT ANNUITY	Supplement income with fixed annual payments	Enter into a contract that pays you fixed payments annually	Current and future savings on income taxes; fixed payments for life
CHARITABLE LEAD TRUST	Reduce gift and estate taxes on assets passing on to heirs	Create a trust that pays a fixed or variable income to your favorite ministry for a set term and then passes to heirs	Reduced size of taxable estate; keeps property in family, often with reduced gift taxes
DONOR ADVISED FUND	Make a gift that allows flexibility and your input on how funds will be used	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

LEGACY GIVING OVERVIEW

The goal of planned giving is to help you plan your estate and charitable giving in a way that benefits you, your family and charity. There are many ways you can make a planned gift to charity and enjoy tax and income benefits.

This brochure provides you with a quick overview of planned giving options. For more detailed information, please visit our website, or contact us using the form attached, email or telephone. We are available to help you make the right decision for you and your family.