

YOUR GOAL YOUR GIFT

| YOUR GOAL | YOUR GIFT | HOW TO MAKE A GIFT | YOUR BENEFITS |
|--|------------------------------------|---|---|
| Make a quick and simple gift | OUTRIGHT GIFT | Donate cash, securities or personal property | Income tax deduction; avoidance of any capital gains tax |
| Defer a gift until after your lifetime | BEQUEST IN WILL | Name your church or favored cause in your will | A donation exempt from federal estate taxes |
| Make a large gift with little cost to yourself | LIFE INSURANCE GIFT | Give an old or new policy with your church or favored charity 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 favored cause as beneficiary of all or part of the remaining assets after your lifetime | Avoidance of heavily 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 |
| Give your personal residence or farm, but continue to live there | RETAINED LIFE ESTATE | Designate the ownership of your home to your favored cause, but retain occupancy | Charitable income tax deduction and lifetime use of home |
| Secure a fixed and often improved income | CHARITABLE REMAINDER ANNUITY TRUST | Create a charitable trust that pays you a set income annually | Immediate income tax deduction and fixed income for life |
| Create a hedge against inflation over the long term | 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 |
| Reduce gift and estate taxes on assets passing on to heirs | CHARITABLE LEAD TRUST | Create a trust that pays a fixed or variable income to your favored cause for a set term and then passes to heirs | Reduced size of taxable estate; keeps property in family, often with reduced gift taxes |
| 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 |



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WAYS TO GIVE

- **BEQUESTS**
Make a gift in your will...
- **CHARITABLE REMAINDER TRUST**
Pays you income based on the asset value...
- **CHARITABLE GIFT ANNUITY**
Your transferred assets benefit your favored charity and you through life income payments...
- **CHARITABLE LEAD TRUST**
Provides for your church or favored cause as well as your children...
- **DONOR ADVISED FUND**
Simple and flexible, provides immediate tax benefits but you still have input on future disbursements...
- **RETAINED LIFE ESTATE**
One of your valued possessions, your home, can become a valued gift even while you are living in it...

WHAT TO GIVE

- **CASH**
Simplest way to give...
- **SECURITIES**
Best securities to donate are appreciated stocks...
- **LIFE INSURANCE**
Donate the policy or name your church or favored charity as beneficiary...
- **REAL ESTATE**
If you own property that is paid off, you can transfer this asset to a beneficiary but still live in it...
- **RETIREMENT PLAN ASSETS**
Reduce tax to heirs by naming your church or favored cause as beneficiary...

VISIT OUR WEBSITE TO LEARN MORE ABOUT ESTATE PLANNING AND PLANNED GIFT OPTIONS AT WWW.TMF-FDN.GIFTLEGACY.COM.

THE TEXAS METHODIST FOUNDATION CAN HELP YOU WITH ANY GIFT THAT IS PRIMARILY FOR A UNITED METHODIST CHURCH, INSTITUTION OR CAUSE.

When you are ready to make a gift...

1. Talk to your financial advisor or estate planning attorney to decide what you want to give and the way you want to give it.
2. Contact **Justin Gould, Vice President of Development**, at 800/933-5502 or jgould@tmf-fdn.org. He can work with your advisors to complete the gift. The Foundation also provides trustee and accounting services for planned gifts.
3. Tell others about the benefits of planned giving:
Extend your reach into the future by giving gifts that will endure beyond your lifetime.
 - Obtain immediate and/or deferred tax benefits
 - Receive life income benefits, with certain gifts



FOR MORE INFORMATION, PLEASE CONTACT TMF CHARITABLE SERVICES AT 800/933-5502.