



Promoting Planned Giving



The following “one-liners” should be incorporated inside each edition of the church newsletter, using a different one each week.

Example:

Plant a tree for your great-grandchildren to climb. Remember the (Church Name) Endowment Fund in your estate plans.

--A reminder from your (Church name) Endowment Committee

Planned Giving “One-liners”

1. Preparing an estate plan is good Christian stewardship – saying thanks to God, expressing your love and concern for family and showing charity toward others.
2. Remember, if you have no will or trust, state law will determine who will inherit your property at your death. State laws do not include your Church or any other charity as a beneficiary.
3. Share your love for the Church with future generations. Leave a legacy gift to the (Church Name) Endowment Fund.
4. Giving to the Church through your will or trust is a great way to share life-changing ministry with future generations. When your estate plan is prepared, include a gift to your (Church Name) United Methodist Church.
5. Did you know that there is no deduction limitation on the size of a charitable gift that may be given to the Church at the time of your death. No matter how large, the gift is deductible for federal estate tax purposes.
6. Life insurance can offer a helpful way to remember the Church in your plans. Consider naming the Church as a beneficiary of any insurance policy.
7. Consider naming your church as the beneficiary of an existing life insurance policy. In addition, if you decide to transfer the *ownership* of the policy to the Church, the current value of the policy is a current charitable gift.

8. Give a gift that keeps on giving. Consider a memorial gift to the (Church Name) Endowment Fund.
9. Stocks and bonds are an excellent means of making a gift to your Church. Contact the Church office for a brochure describing the tax benefits and the simple transfer instructions.
10. Assets in a retirement account can be taxed heavily if you leave them to your heirs. Consider naming the Church as beneficiary of a portion of your retirement account.
11. A simple way to make a gift to the Church from your estate at death is to name the Church as a beneficiary on your traditional IRA or retirement plan. Simply contact your plan administrator.
12. If you are over 70 ½ you can make a gift directly from your IRA with no tax liability – AND the gift counts toward your required minimum distribution.
13. A Donor Advised Fund at the Missouri United Methodist Foundation can help you maximize tax savings. One bigger gift sprinkles across multiple years.
14. Real estate can be a wonderful gift for your Church. Life-changing ministry can flow from your gift of vacant land, a home or farm.
15. Consider making a gift of the *future* ownership of your personal residence or farm today. You keep full ownership for your lifetime, but receive a current income tax deduction.
16. How long has it been since you updated your will or trust? Does it carry out your wishes? Does it leave any gift to the Church to carry on its ministry to future generations?
17. You can name the Church as a beneficiary of your estate in several ways. Consider gifting the Church a specific amount, a percentage of your estate or the remainder of the estate after all other gifts are made.
18. Thank you for generously supporting the work of Christ's Kingdom through the ministries of the (Church Name) United Methodist Church. Your gifts touch lives in the name of the living Christ every day.