

SUGGESTED LANGUAGE FOR A REQUEST TO BENEFIT MY CHURCH THROUGH AN ENDOWMENT

I give _____ (set amount, specific property or 10% of my estate) to The Holston Conference of the United Methodist Church Foundation, Alcoa, Tennessee to create the _____ Endowment _____ to perpetually support _____ (purpose like maintenance, missions, scholarship or annual priority need as determined by Church Council, etc.) at _____ United Methodist Church located at _____. If the church should ever close without merging with another United Methodist Church this endowment should continue and be directed to support other valid ministries in The Holston Conference of the United Methodist Church.

SUGGESTED LANGUAGE FOR A REQUEST DIRECTLY TO MY CHURCH

I give _____ (set amount, specific property or 10% of my estate) to _____ United Methodist Church at _____ to be used for _____ (as needed, for a specific ministry, or to create an endowment to support _____).

BENEFITS OF ENDOWMENTS

1. **Durability** - They like the concept of a fund that is guarded and invested separately from other assets so the principal of the fund will stay intact.
2. **A Positive Legacy** - When donors attach their names to an endowment fund or add funds to a church-established endowment fund, they create an enduring legacy that will outlive them and influence succeeding generations.
3. **A Firm Foundation** - Endowments invested with the Foundation are properly invested in a diversified long-term mix of socially responsible assets and used for the purpose(s) as directed by the donor.



THE HOLSTON CONFERENCE OF
THE UNITED METHODIST CHURCH
FOUNDATION, INC.

P.O. Box 900
Alcoa, TN 37701-0900
(865) 690-8124 (phone)
(866) 690-4080 (toll-free)
(865) 690-3162 (fax)

rogerredding@holston.org
paulbowman@holston.org

www.foundation.holston.org

A GUIDE TO PLANNED GIVING TO BENEFIT MY CHURCH



Holston Conference of the
United Methodist Church
Foundation, Inc.

At Your Service

The Holston Conference Foundation exists to assist United Methodist Churches and ministries accept and steward special gifts, endowments, bequests, and other planned gifts to benefit the church. Our consultation, which is free of charge, frequently includes detailed estate and tax planning, complete with personalized illustrations and sample documents for prospective donors and their professional advisors. We also assist churches establish endowment charters and are available to provide educational workshops and materials.

Estate planning is a very individualized process. It gives every individual an opportunity to reflect on his/her life and on God's blessings. It also provides an opportunity to take care of loved ones and provide for the causes we care about most. We invite you to pray about your plan, talk with your family, visit our website, seek professional advice or even call us to begin a conversation.

PLANNED GIVING

Your gift to your local United Methodist Church will help strengthen and extend the congregation's ministry for generations to come. Your gift is an investment in the place where you worship and have built your family's spiritual foundation.

There are many ways to make charitable contributions to your church besides writing a check. Speak with your financial or legal advisor or contact the Foundation to learn the latest about the many tax benefits of planned gifts.

Consider how you want your gift to be used. It may be left to the discretion of the church, directed for a specific use, or even to fund a named endowment or scholarship. The choice is yours and we are available to assist with a written agreement that clarifies your choices.

GIFTS OF STOCK

Gifts of appreciated stock held longer than one year can maximize your charitable impact while eliminating capital gain taxes. The Foundation processes stock gifts for individuals and remits the proceeds to the church or charity as requested, with no cost other than the reduced broker's commission.

GIFTS OF RETIREMENT PLANS

You can name your church as a partial or full beneficiary of your pension, 401k, 403b, IRA or other retirement plan. Your plan administrator will provide you with the beneficiary designation forms you need to make this legacy gift.

GIFTS OF LIFE INSURANCE

You can name your church as the beneficiary or even tithe the proceeds of a life insurance policy to the church. Paid up insurance can also be gifted to make the church owners of the policy.

BEQUEST

By leaving a bequest in your will, you can continue to protect and preserve the church you love for generations to come. Your bequest can be a specific amount or a percentage of your estate to be paid after other bequests, such as gifts to your family have been made. Sample language can be found on the back page of this brochure or you may contact us to discuss ways to designate or endow your gift.

REMAINDER TRUSTS

A Charitable Trust can provide for you and your family before and after your death. You can arrange a contribution to fund a charitable trust while you are living or through your estate plan. The trust remainder can be directed to benefit your church or favorite ministry.

GIFT ANNUITY

Contact the Foundation to create a Charitable Gift Annuity that provides fixed income for your life, tax savings and ultimately the remainder benefits the church.

Ex.: Simple Life \$10,000 CGA - 8/2017

Age	Rate	Income	Annual Tax-Free	Charitable Deduction
65	4.7%	\$470	\$331	\$3,548
70	5.1%	\$510	\$377	\$4,452
75	5.8%	\$580	\$447	\$4,626
80	6.8%	\$680	\$548	\$5,065
85	7.8%	\$780	\$672	\$5,699
90	9.0%	\$900	\$816	\$6,328