



California-Nevada  
United Methodist  
FOUNDATION

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# PERSONAL PLANNING Newsletter

Winter 2024



NEW YEAR  
NEW  
FUTURE



[www.canvumfgiving.org](http://www.canvumfgiving.org)

1350 Halyard Dr., West Sacramento, CA 95691

# A NEW WAY TO BEGIN

This year, give yourself the gift of peace and predictability. With so much uncertainty in the world, would you like the comfort of beginning this year (and every year) with a more certain future?

We have tools and ideas that will help you bring more reliability and dependability to your year and your life.

A more dependable new year gives you:

- Income tax savings
- Capital gains tax savings
- New payment streams for you and your spouse



Each of the following are powerful tools to help you craft a dependable future for yourself:



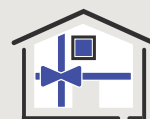
## CHARITABLE REMAINDER UNITRUST

Transfer appreciated stock to this trust without paying capital gains, then get an income stream and other tax benefits for the rest of your life



## CHARITABLE GIFT ANNUITY

Fund a charitable gift annuity with us and receive favorable fixed rate payments for life. You also receive an income tax deduction this year



## LIFE ESTATE

Transfer title from your house or other property to charity and continue living there for life, while receiving income tax benefits today

## We can help you create a future where you will receive dependable tax benefits

With the right tools, such as a charitable gift annuity, you receive reliable payments in the same amount every year for as long as you live.

While the future is never predictable, parts of it can be

# AN EASY PLAN

Sometimes a little planning gives big benefits. Many people believe that for a plan to have value, it must be long and complicated. It does not need to be. Some of the most significant planning can be done in a few moments.

Many of us want to provide for our family and the causes we cherish but don't want the hassle of amending or updating our wills or estate plans. While an up-to-date will is important, you can accomplish many of your goals outside of your will.

Some of your biggest assets can be handled outside your will

Think about where you have most of your assets:

- Savings account
- Checking account
- Investment account
- Retirement account: IRA, 401(k), 403(b)

Most of your assets are probably held in one or more of these accounts. If you plan to leave funds from any of them to your family or to the causes you support, you can make your designation with a simple form.

Contact your account administrator and ask for a beneficiary designation form or payable on death form. No matter what your administrator calls it, it allows you to transfer assets automatically when you pass away.

You can change your mind and change this form quite simply. You can also designate percentages (for example, 50% to your spouse and 25% to each of your two children). While these can be given outside your will, it should still be a part of your larger plan, so be sure to check with your attorney or accountant to make sure these designations support your larger goals.

Create a big plan in 10 minutes with a simple form.



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## A BENEFIT FOR LIFE

It is always nice to receive a gift, but what if you receive one knowing that gift will repeat for as long as you live? A charitable gift annuity gives you that benefit for life.

When you fund a charitable gift annuity, you receive payments from us for as long as you live. The payments are at a favorable fixed rate based on your age and will never change no matter how long you live or what the economy does. The favorable rates can be even higher if you choose to delay the first payment.

When you fund a charitable gift annuity, you also receive an income tax deduction this year for part of the funding amount. You may also receive capital gains benefits if you transfer the appreciated stock directly to us to create the charitable gift annuity. You can fund a charitable gift annuity for yourself or you and your spouse. There are other options as well. Call or email us to learn what your exact rate and tax savings will be.

You cannot outlive  
the benefits



Your payments are  
made at favorable  
fixed rates

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