



CALIFORNIA-NEVADA UNITED METHODIST FOUNDATION

Bulletin 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 laws 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. Consider naming the Church as a beneficiary in your Will or Living Trust. The gift could be a set dollar amount, a percentage of your estate, the remainder after other gifts are made, or a gift of part of the estate left if designated heirs are deceased.
4. Did you know that there is no 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 purposes.
5. Think about the part you want to play in our Church's future. You have the opportunity to support this ministry in many ways. Naming the Church as a beneficiary in your estate plan or the making of an endowment gift can assure your continued participation in this ministry far into the future.
6. Giving to the Church through your Will is the most common way to continue your support beyond your lifetime. When your Estate Plan is prepared, consider a gift to the Church.
7. Life insurance is a way to make a larger gift to the Church than you might otherwise be able to afford. Consider naming the Church as a beneficiary of any insurance policy.
8. Our trustees and pastor enthusiastically support planned giving to our Church. Contact them for more information.
9. We accept endowment gifts. The income will be used for special Church projects. The principle of the gift is never spent and continues indefinitely.
10. Anyone can give an endowment gift. Any size gift may be made as an endowment. You may do this now or as part of your estate plan.
11. Under current laws, appreciated securities and real estate can be deductible for federal income tax purposes at their present fair market value. In most cases, the appreciation is not taxed to you at all. Consider using such outright gifts to pay your pledge, for special gifts, or toward an endowment.
12. Consider giving property to the Church now, but keeping the annual income until your death. You may even give your home and keep the use of the property until your death. A current Federal income tax deduction is available for the value of such gifts to the Church.
13. A gift can be made to the Church by selling the Church an asset at less than current value. The difference between the sales price and the current value is a gift to the Church when it buys the asset. This gift can qualify for a Federal income tax deduction.

14. Consider transferring the ownership of some of your life insurance to the Church. The cash value, when given, plus the annual premium, can qualify for a Federal income tax deduction.
15. Consider naming the Church as a beneficiary of your life insurance or retirement plan. If you have named other beneficiaries, consider naming the Church as a secondary or backup beneficiary in case the first beneficiary is deceased at the time of your death.
16. You may specify that your bank accounts are “in trust for the Church”. You retain total control over the account during your life. However, the property passes to the Church at your death, without probate.
17. Stocks and bonds are an excellent means of making a gift to your Church. You can be entitled to a Federal income tax deduction, if you give these securities to the Church during your lifetime. Ask your professional advisors for assistance.
18. If you are a stockholder in a closely-held corporation, consider having the corporation make a gift to the Church. Like individuals, corporations can deduct charitable gifts.
19. Some corporations have programs to match gifts that are made to charities by their employees. This is a way of effectively increasing your gift to the Church, if it is available. Ask your employer.
20. The Church will consider gifts of jewelry, art, coin collections, antiques, mineral rights and related items. These gifts can be made during your lifetime or at your death. Contact your tax advisor for more information about how to calculate your tax deduction.
21. Retirement funds present new opportunities for giving to the Church. You may want to name the Church as the beneficiary of your individual retirement account or other retirement funds, in the event that you or other family members die before receiving all of the funds.
22. Real estate offers opportunities for giving to your Church. Consider the gift of vacant land, condominium, commercial property, home, farm, or other types of real estate. You could be entitled to a Federal income tax deduction for the fair market value of the property at the time the gift is made.
23. Consider making a gift of your personal residence or farm now and continuing to live there until your death. An immediate income tax deduction may be available for this arrangement. Maintenance costs might also be shared. At your death the property would be available for Church use.
24. Trusts allow you to make a gift to the Church in the future. You may set up the Trust now and keep the income for yourself or other beneficiaries as long as you choose, even for life. The Church would receive the property after that. Current income tax deductions can be available.
25. Charitable Remainder Trusts or Charitable Lead Trusts allow you to make a gift to charity of income or principal, while keeping one or the other for yourself or other beneficiaries. We urge you to investigate these possibilities with your tax advisor.
26. Memorial gifts meet two important needs at once. They allow you to express your feelings at the loss of a loved one. In addition, the gift to the Church helps support its ministry. Appropriate cards are sent to the bereaved family indicating the fact that your memorial gift was made (but not the amount).
27. Our pastor enthusiastically supports the Church’s planned giving program. If you are interested in making any special gifts to the Church, feel free to discuss this with our pastor. The pastor will help put you in touch with appropriate advisors.

28. Have you received an inheritance? If so, consider gifting part of the inheritance to the Church, in memory of the loved one who remembered you. You can make this gift now or in your estate plan.
29. Consider making an endowment gift to the Church for a scholarship fund or other memorial in the name of your family. In this manner, your family name can live on forever. Feel free to discuss with the pastor any special programs or projects you would like to support.
30. If a special friend or relative precedes you in death, consider commemorating this individual through a memorial gift to your Church. This will show your appreciation for this treasured relationship and help the Church. An acknowledgement card will be sent to the surviving family, letting them know of your gift, without disclosing the amount.
31. Consider giving the use of your property to your heirs for the duration of their life, but having the property left at their death pass to the Church as a memorial. Your surviving beneficiaries will have the use of the property for their lives. The property will help support the ministry of the Church after their death.
32. Did you know that the state has made a Will for you if you have no Will yourself? These laws might not leave your property to the people you wish. These laws definitely don't leave any property to the Church or any other charity. Shouldn't you prepare a Will or Living Trust?
33. How long has it been since you updated your Will? Does it carry out your wishes? Does it leave any gift to the Church to carry on its ministry after your death?
34. You can share your faith beyond your lifetime by signing your estate planning documents now. You will have the joy of knowing that whatever you do not use in this life will continue in ministry after your death.
35. Have you written and signed a Will or Living Trust? The state will do it for you, if you don't. These state intestacy laws do not include any gifts to the Church.
36. When you make your estate planning documents, consider naming the Church as your final beneficiary.
37. There are many reasons to update your estate planning documents. One is to include a gift to your Church.
38. Have circumstances changed since you last updated your estate plan? Do your current estate planning documents carry out your commitments to your Church? If not, amend your documents now.
39. Did you know that an estimated 70% of all people who die do not have a Will or Living Trust? Without proper estate planning, no charity can receive gifts from your estate. Be sure your estate planning is up to date. Do you know who your heirs will be? Is your Church a beneficiary of your estate?
40. Proper estate planning can reduce administrative time, expense and inconvenience. Document your estate planning properly. Consider giving the Church the administrative costs you could save.
41. Remember your Church in your Will and Living Trust.
42. Who needs estate planning? Every adult who is legally competent, that owns anything and cares about who receives it at the time of their disability or death. In addition, estate planning is necessary for anyone who wants to leave a bequest for the Church.

43. Have you moved to another state since signing your estate planning documents? If so, consider having the documents checked by an attorney in the new state. In addition, consider naming the Church as a beneficiary.
44. Your Will is the proper place to name the guardians for your children. Pick your guardians yourself, rather than leaving this decision to the probate courts. In addition, consider naming your Church as a beneficiary.
45. Who will receive your property if you and your immediate family are deceased? Consider naming the Church as the final beneficiary in your estate plan.
46. Good stewardship requires us to think of the future. Have your estate plan prepared now and include a gift to your Church.
47. Avoiding probate or minimizing estate taxes at death require proper planning. When you are doing this planning, consider making a gift to your Church.
48. The gifts you make in your estate plan can carry on your charitable support after your death. Consider making a gift to the Church in your estate plan.
49. Don't wait to have your estate plan prepared. None of us knows when his life will end. Prepare your estate plan now and remember that a gift to your Church will help others even after your death.
50. Be sure that your estate planning documents are properly prepared. A homemade Will can result in unnecessary expense and delay. When your documents are prepared, consider naming your Church as a beneficiary.
51. A gift to the Church is a testimony to your faith and the confidence you have in the ministry of the Church.
52. Did you know that owning all of your assets jointly may result in paying Federal estate taxes that might be avoided through proper estate planning? Ask your tax advisor and have your advisor add the Church to your estate plans as a beneficiary.
53. The costs of having your estate plan prepared can be a terrific bargain. You may save many times the cost in taxes and administrative expenses to your heirs. The estate planning can also make it possible for you to make a gift to your Church.
54. Did you know that you can name the Church a beneficiary of your estate in several ways? Consider gifting the Church a specific amount, a percentage of your estate, the remainder of the estate after other gifts are made, or gifts whose beneficiaries predecease you.

California-Nevada
United Methodist Foundation
1350 Halyard Drive
West Sacramento, California 95691
888-789-7374
susanp@canvumf.org
www.canvumf.org