

Giving Methods to First United Methodist Church

Gift	Bequest	Cash	Securities	Retirement Assets	Life Insurance	Property	Charitable Lead Trust	Charitable Remainder Trust	Charitable Gift Annuity
Goal	A gift through your will or revocable trust enables you to provide significant support when you no longer require the asset.	A generous straight-forward and simple financial gift.	An outright gift of securities, providing generous charitable support while reserving tax benefits for you.	Now: Transfer a charitable IRA distribution directly to the Church. Later: Make FUMC the beneficiary of your retirement accounts.	A generous gift to FUMC with a policy that may no longer be needed.	Donate all or a portion of appreciated real estate, a business or personal property. Enjoy use throughout your life or give instantly to FUMC.	A generous gift of income payments for a set period of years after which the assets are transferred back to the grantor or heirs.	An irrevocable gift to a trust that provides you a fixed or variable income for life or a set term. At termination the residual goes to FUMC.	Irrevocable gift that provides you a regular fixed payment for life. After your lifetime, FUMC receives the residual value.
How To	Name FUMC in your will or living trust. You can choose a % or specific value.	Simply write a check or make a donation.	Transfer stock or other securities directly.	Work with the church and your advisors to transfer now or change your beneficiary.	Change ownership or name FUMC as beneficiary of a paid up policy.	Work with the church and your advisors to transfer now or change your beneficiary.	To establish a lead trust, work with a reliable, experienced estate attorney.	Establish a charitable remainder trust and name a trustee.	Establish a charitable gift annuity contract with the Texas Methodist Foundation
\$	No Minimum	No Minimum	No Minimum	No Minimum	No Minimum	No Minimum	Minimum \$200,000	Minimum \$100,000	Minimum \$10,000
Your Benefit	1) Your generous support 2) Retain asset for use during your lifetime 3) Fully deductible for federal estate tax	1) Your generous support 2) Immediate income tax deduction	1) Your generous support 2) Federal income tax deduction 3) Avoidance of long-term capital gains.	1) Your generous support 2) No estate or income taxes for FUMC 3) Heirs could encounter both income and estate taxes	1) Your generous support 2) Potential income tax deduction	1) Your generous support 2) Avoid incurring capital gains tax on its sale 3) Tax deduction that year	1) Your generous support 2) Income to FUMC for a set period 3) Removes trust assets from the estate 4) No deduction	1) Your generous support 2) Fixed or variable income 3) Income tax deduction 4) Reduce taxable estate	1) Your generous support 2) Tax benefits 3) Higher income than CDs or Treasuries 4) More stability than equities