



YOUR GOAL	YOUR GIFT	HOW TO MAKE A GIFT	YOUR BENEFITS
Make a quick and simple gift	OUTRIGHT GIFT	Donate cash, securities or personal property	Income tax deduction; avoidance of any capital gains tax
Defer a gift until after your lifetime	BEQUEST IN WILL	Name your church or favored cause in your will	A donation exempt from federal estate taxes
Make a large gift with little cost to yourself	LIFE INSURANCE GIFT	Give an old or new policy with your church or favored charity named as beneficiary	Current income tax deduction; possible future deductions
Avoid the twofold taxation on retirement plan assets	RETIREMENT PLAN GIFT	Name your church or favored cause as beneficiary of all or part of the remaining assets after your lifetime	Avoidance of heavily taxed gift to heirs
Avoid capital gains tax on the sale of a home or other real estate	REAL ESTATE GIFT	Donate the property or sell it at a bargain price	Immediate income tax deduction and avoidance of capital gains tax
Give your personal residence or farm, but continue to live there	RETAINED LIFE ESTATE	Designate the ownership of your home to your favored cause, but retain occupancy	Charitable income tax deduction and lifetime use of home
Secure a fixed and often improved income	CHARITABLE REMAINDER ANNUITY TRUST	Create a charitable trust that pays you a set income annually	Immediate income tax deduction and fixed income for life
Create a hedge against inflation over the long term	CHARITABLE REMAINDER UNITRUST	Create a trust that pays a percentage of the trust's assets, valued annually	Immediate income tax deduction, annual income for life that has potential to increase
Supplement income with fixed annual payments	CHARITABLE GIFT ANNUITY	Enter into a contract that pays you fixed payments annually	Current and future savings on income taxes; fixed payments for life
Reduce gift and estate taxes on assets passing on to heirs	CHARITABLE LEAD TRUST	Create a trust that pays a fixed or variable income to your favored cause for a set term and then passes to heirs	Reduced size of taxable estate; keeps property in family, often with reduced gift taxes
Make a gift that allows flexibility and your input on how funds will be used	DONOR ADVISED FUND	Create an agreement where the Foundation manages assets, you suggest beneficiaries	Immediate income tax deduction, option to provide input on how funds will be used



WAYS TO GIVE

■ BEQUESTS

Make a gift in your will...

■ CHARITABLE REMAINDER TRUST

Pays you income based on the asset value...

■ CHARITABLE GIFT ANNUITY

Your transferred assets benefit your favored charity and you through life income payments...

■ CHARITABLE LEAD TRUST

Provides for your church or favored cause as well as your children...

■ DONOR ADVISED FUND

Simple and flexible, provides immediate tax benefits but you still have input on future disbursements...

■ RETAINED LIFE ESTATE

One of your valued possessions, your home, can become a valued gift even while you are living in it...

WHAT TO GIVE

■ CASH

Simplest way to give...

■ SECURITIES

Best securities to donate are appreciated stocks...

■ LIFE INSURANCE

Donate the policy or name your church or favored charity as beneficiary...

■ REAL ESTATE

If you own property that is paid off, you can transfer this asset to a beneficiary but still live in it...

■ RETIREMENT PLAN ASSETS

Reduce tax to heirs by naming your church or favored cause as beneficiary...

VISIT OUR WEBSITE TO LEARN MORE ABOUT ESTATE PLANNING AND PLANNED GIFT OPTIONS AT WWW.TMF-FDN.ORG (CLICK ON SERVICES FOR INDIVIDUALS AND GIFT PLANNING AND THEN "CREATE YOUR PLAN" FOR MORE RESOURCES).

HOW TO GIVE

THE TEXAS METHODIST FOUNDATION CAN HELP YOU WITH ANY GIFT THAT IS PRIMARILY FOR A UNITED METHODIST CHURCH, INSTITUTION OR CAUSE.

When you are ready to make a gift...

1. Talk to your financial advisor or estate planning attorney to decide what you want to give and the way you want to give it.
2. Contact Linda Murdock, Endowment Consultant, at 1-800-933-5502 or lmurdock@tmf-fdn.org. She can work with your advisors to complete the gift. The Foundation also provides trustee and accounting services for planned gifts.
3. Tell others about the benefits of planned giving: Extend your reach into the future by giving gifts that will endure beyond your lifetime.
 - Obtain immediate and/or deferred tax benefits
 - Receive life income benefits, with certain gifts

FOR MORE INFORMATION PLEASE CONTACT LINDA MURDOCK, ENDOWMENT CONSULTANT AT LMURDOCK@TMF-FDN.ORG OR 800/933-5502.