

WAYS TO GIVE

Beneficiary Designation of IRA / Life Insurance / Other assets) -- Donors may name the Church as a beneficiary of some or all of a retirement plan or IRA. This avoids taxation as part of the estate and simply requires changing the beneficiary on the IRA form. It does not require an attorney.

Life Insurance Policy Gift -- Donors may name the Church as a beneficiary or give a paid up policy to the Church during their lifetime by naming the Church as beneficiary & owner of the policy. The Church may sell or maintain the policy. Any additional premium payments made by the donor are also gifts.

Current gift of retirement funds -- After age 59½ funds may be withdrawn without penalty & used for charitable giving. Direct transfers to charity (when allowed) are not considered income & count as Required Minimum Distribution.

Outright gifts of cash, securities or personal property -- Charitable gifts of assets that have increased in value can be especially cost-effective for the donor in that they avoid all capital gain taxes and qualify for a charitable tax deduction. Special rules may apply to certain types of property.

Bequests in will or trust -- Donors may name the Church as a beneficiary & leave a specific amount or percentage or specific security or property. First Church suggests that donors leave a percentage rather than a specific amount. That way donors do not have to worry about using up the estate as they age. If you already have a will or trust, a simple will codicil or trust amendment can add First Church as a beneficiary & does not require rewriting your most recent document. Bequests to the Church may reduce certain taxes on the estate.

Charitable Remainder Annuity Trusts & Unitrusts -- Donors may create a trust from an irrevocable transfer of cash, securities or property for the benefit of First Church. The donor or designated beneficiary may receive a fixed dollar amount or percentage annually for life or a fixed term. When the trust terminates, the remainder interest is transferred to the Church.

Charitable Lead Trusts -- Lead trusts pay an annual income to First Church for a specified period. At termination, the trust's assets revert to the donor or a non-charitable beneficiary. This method subjects the donor's estate to lower gift & estate taxes while possibly giving beneficiaries a larger inheritance than they might receive with an outright bequest.

"Use your God-given gifts well and wisely to earn all that you can, that you might practice frugality and save all you can, that you might have more than enough so that you are able to give all you can."

-John Wesley

FIRST CHURCH ENDOWMENT FUND

LEAVE A LASTING LEGACY



Downtown

West Campus

*First United Methodist
Church of Lawrence
is the living legacy
of visionaries who
planned for the future
and put their faith
and gifts into action.*



Phone: 785-841-7500

Email: office@fumclawrence.org

What is the Endowment Fund?

First Church's Endowment Fund is an account maintained independent of the Church's Operating Budget. While the General Operating Budget covers the cost of the Church's programs for a given year, the Endowment Fund is meant to provide a strong foundation for programs, ministries and facilities that First Church may not currently envision.

Why have an Endowment Fund?

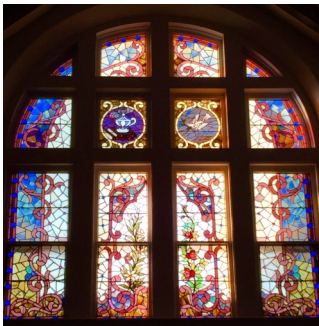
Allocating a portion of what we have to be given to God is a powerful witness to the importance of our faith and our church in our lives. Gifts to the Endowment Fund help to ensure perpetual support for the ministries of First Church.

How does the Endowment Fund work?

Undesignated gifts and bequests are put into the Endowment Fund. Each year, the income from the Fund is expended for special projects, but the principal is primarily retained.

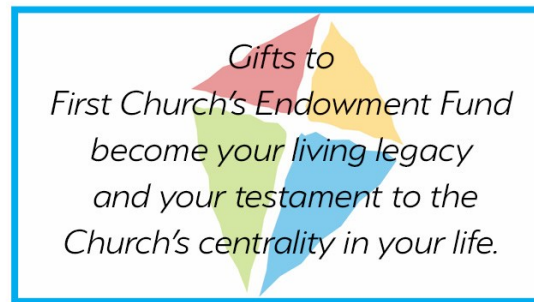
What might the Endowment Fund be used for?

In general, Endowment funds are used for one-time distributions rather than ongoing projects. Endowment funds have provided hymnals, stained glass windows, Sunday School classroom remodeling, special missionary projects, kitchen remodeling, musical instruments, folding chairs, sound system upgrades and college scholarships.



Why should I give to the Endowment Fund?

Some members give regularly to the Operating Budget and the Building Fund but do not consider leaving gifts to the Endowment Fund. Church members may be concerned about preserving funds to care for themselves as they age. The benefit of giving to the Endowment Fund is that this giving does not need to reduce funds needed during their lifetime. Donations can be made after death from funds remaining in the estate. These funds will be a legacy to help provide for Church needs in the future.



How much is the church asking me to give?

What you give is entirely up to you. Many members consider leaving a tithe (10%) gift. Your gift, no matter the size, will provide benefits long after it is made. The church asks you to thoughtfully consider the importance of the church in your life and to plan for its future.

How can I make a planned gift?

There are many ways to plan for First Church's future. A representative of the Church will be happy to meet with you to determine what method might work for you. A partial list of ways to give is on the back of the brochure.

(Please consult with your tax or financial advisor to find out more about any of the giving options listed. Your advisor can help you choose the most beneficial assets to donate and design a giving plan that matches your goals and values.)

Planned Giving for First United Methodist Church of Lawrence

Name:

Home Address:

City, State, Zip Code:

Phone:

Email Address:

I/We have taken the following action:

- Named FUMC in a will or trust.
- Contributed to a charitable trust identifying FUMC as the beneficiary.
- Named FUMC as a beneficiary of a retirement plan/IRA.
- Named FUMC as a beneficiary of a life insurance policy.
- Other: _____
- I/We plan to name FUMC in my/our estate planning.
- Please contact me/us to assist in choosing & completing a planned gift.