



Steps to a PLANNED GIFT

1 LEARN

As you plan your gift, please know that planned giving is far more than a transaction, it is...

AN EXPRESSION OF GRATITUDE

All of us are indebted to the past, to those who precede us. We enjoy liberties we have not won. We share faith whose foundations we have not laid.

A TESTIMONY

We are called to partner in faith with those who have gone before us, to support this church's mission—*making disciples of Jesus Christ for the transformation of the world*—even after our own lifetimes, and to offer the best that we have to give to those who will follow.

AN OPPORTUNITY

We sow seeds of the future, for those who will succeed us. We dream and envision and set things in motion. The fruition of our decisions will be known only to others whom we may never meet.

2 DESIGN Your Gift

When you pass along your remaining assets, you may have the opportunity to make the largest and therefore the most impactful gift of your life. Here are some examples of the more common gifts to consider:

Bequest

Make a gift after your lifetime through your will or trust. This can be a fixed dollar amount, a specific asset, or a percentage of your estate.

Retirement Account

This can be the most heavily taxed asset in many estates. Choosing this as your gift might leave your less tax-burdened assets to your loved ones.

Real Estate

Contributing property after your lifetime or when it is no longer needed can be a game-changing gift.

Charitable Trust

Trusts can combine flexible benefits including a generous income, tax benefits and a powerful gift to First United Methodist Church.

Life Insurance Policies

Paid up whole life policies can be ideal items to donate to the church.

Other giving opportunities might prove ideal for your situation. In order to make sure a particular planned gift fits your situation, we suggest that you consult with your professional advisor.

3 IMPACT The Future

Through your planned gift, you will continue supporting the work God is doing in and through First Methodist for future generations. You can state your preference to either of the funds:

General Endowment

Gifts to the General Endowment fund special needs and ministries as determined by our church leaders.

This type of fund is also referred to as an "unrestricted endowment."

Designated Fund

You can designate that your gift be used for specific purposes, for example, Youth, Music, TV Ministry, Missions, etc.

This type of fund is also referred to as a "restricted endowment."

 First United
Methodist Church
of Baton Rouge

PH: 225-383-4777

WEB: firstmethodist.org

4 TEACH Generosity

HEBREWS 11:1-2

Faith is the assurance of things hoped for, the conviction of things not seen. Indeed, by faith our ancestors received approval.

We teach by demonstrating our values through our words and actions. Now that you have made a gift, you may expand your impact by sharing with loved ones the "why" of your gift.

SHARE THE NEWS OF YOUR GIFT WITH:

Your loved ones so that they can witness your commitment beyond your lifetime—and follow your example to plan their own legacy for the future.

First United Methodist Church so that your gift may inspire others to begin to pray and think about what legacy they might leave to First Methodist.



BILL POTTER,
Chair of First United Methodist
Church's Endowment Committee

PH: 225-921-7254

EMAIL: bpotter@pncca.com