

Making a Bequest to Your Church or Favorite Charity

In considering your plans for the future, you may not only be thinking about how to help your family and save on estate taxes, but also how you might benefit your favorite charitable organizations. A bequest permits you to leave a lasting legacy and often provides valuable tax savings.

Ways to Support your Favorite Mission in Your Estate Plan

Bequests

A charitable bequest is one of the easiest gifts to make. You can create a bequest of any dollar amount, gift specific property, or designate a percentage of your estate in your will or trust plan. If you wish to make a gift of your IRA or 401 (k) plan, this can usually be done by filling out a beneficiary designation form provided by your administrator.

Charitable Gift Annuity

Make a gift of cash or property, receive a tax deductible gift receipt in the year you make the gift and receive a lifetime, fixed income while also benefiting the Lord's work.

HOW CAN WE HELP?

() Please contact me with more information on how to prepare my estate planning documents

() I am interested in a secure fixed income for life and a gift to God's work.

The best way to contact me is by:

[] Email [] Mail [] Telephone

Name: _____

Address: _____

City: _____ State: ____ Zip: _____

Phone: _____

Email: _____

No Obligation and Completely Confidential

When assisted by our Trust Services Department, you will be under no obligation to leave your estate in any certain way. All information used in preparing your estate plan will be kept completely confidential.



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The Future

is what

you make

of it.

Wills, Bequests & Trusts



Do you ever wonder what the future holds?

While it's impossible to know or control what happens in the future, you can have security about achieving your ultimate goals by making a plan.

Planning is one way to create a secure future for you and your loved ones. With a good plan, you can rest easy knowing that your family will be well cared for and your property will pass to your intended beneficiaries.

The goal of this brochure is to help you think through some of the issues to consider in

future planning. Once you have identified your goals, you will want to sit down with your advisor to create a plan that reflects these goals.

Why do I need to plan?

Failure to plan may result in accidental disinheritance. Accidental disinheritance occurs when you have no will or your will doesn't function properly. Because failure to plan means you risk harming those you love and subjecting your estate to needless taxes, most people will need to make a plan for the future.

What are some options for planning my future?

A Will—A will is a written document that permits you to state how you want your property or estate distributed, name an Executor (also called Personal Representative) to distribute your property, pay debts and taxes, and handle other business affairs to settle your estate. It also allows you to appoint a guardian, so that if you pass away, the guardian may take physical custody of and care for your minor children.

A Power of Attorney—A Power of Attorney is a document in which you delegate to your agent the authority to conduct your business for you.

The Living Will and Health Care Directive—The Living Will and Health Care Directive is a document used to indicate your preferences regarding the continued use of life sustaining treatment and is used to appoint a Surrogate who is authorized to make health care decisions for you when you are unable, and to enforce your health care decisions regarding end-of-life treatment.

Living Trust—A trust enables you to place assets with a trustee to be managed for your benefit. Sometimes it is advisable for a trust to be self-managed by the individual(s) who established the trust. The trust can be a valuable tool for the timely settlement and confidential distribution of your estate.