

# WAYS TO HELP OTHERS THROUGH UNITED METHODIST AND OTHER WORTHY CAUSES

## I. GIFTS DURING LIFE

- A. Outright gifts (significant income tax benefits)
  - o Cash
  - o Appreciated securities or real estate (avoid capital gains tax)
  - o Almost any other property
  
- B. Gifts of life insurance  
(perhaps a paid-up policy which is no longer needed)
  
- C. Gifts that pay income to the donor or loved ones for life  
(remainder given to help others)
  - o Fixed amount of income - Charitable Gift Annuity or Annuity Trust
  - o Variable amount of income - Unitrust or Pooled Income Fund
  
- D. Revocable Living Trusts (the giver may revoke or change trust provisions at any time)
  
- E. Short-Term Trusts (income paid to causes specified by donor for a fixed number of years, remainder paid to person(s) designated by donor, or vice versa)

*NOTE: A lifetime gift may be given as a memorial to a loved one or in honor of a living person who is very special to you.*

## II. GIFTS BY WILL

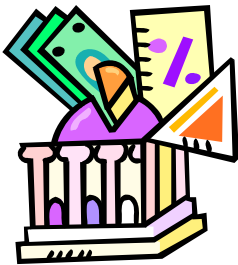
### A. Outright bequests

- o Percentage of estate (usually after providing for care and education of children, taxes and estate settlement costs)
- o Specific amount or designated assets
- o Residue of estate (after specific bequests to loved ones)

### B. Testamentary Trusts - Examples:

- o Single person leaves estate in trust for loved one, remainder to help others
- o Husband leaves estate in trust for wife, portion of remainder to children, portion to help others
- o Wife leaves estate in trust for husband, remainder to help others

### C. Testamentary Gift Annuities (guaranteed fixed income to designated beneficiary(ies) for life, remainder to help others)



Contact The United Methodist Stewardship Foundation of Central Pennsylvania at 1-800-272-0113 or [sfcpa@netrax.net](mailto:sfcpa@netrax.net) for more information on these and other ways to help.