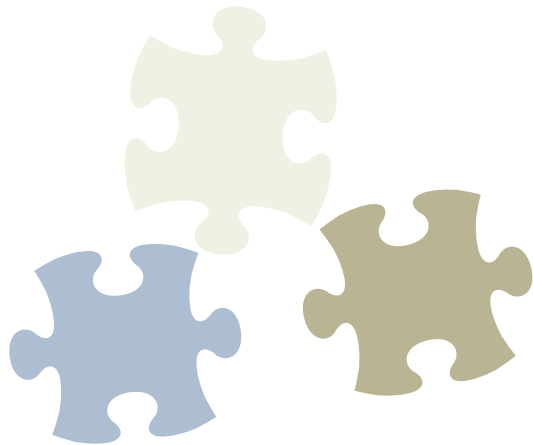




Planned Giving Overview

The goal of planned giving is to help donors plan their estates and charitable giving in ways that benefit both family and charity such as your local United Methodist church or ministry.

There are several options in making planned gifts that provide tax benefits. This brochure outlines several of those options. Please call the Foundation at 800-259-6863 for more information on these planned giving options, plus other ways to give.



For More Information

- I would like to speak with someone who can provide additional giving information.
- I would like to receive information on other charitable giving methods.

Name _____

Address _____

City _____

State/Zip _____

Home Phone _____

E-mail _____

Church _____

Mail to the address below, all inquiries are treated with complete confidentiality.

THE OKLAHOMA UNITED METHODIST FOUNDATION

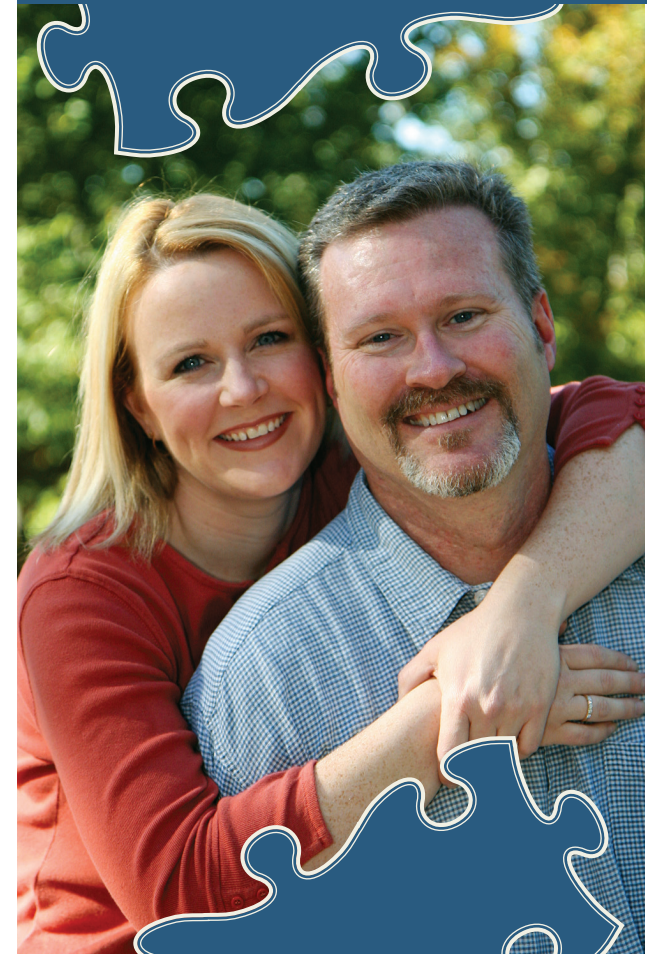
4201 Classen Boulevard
Oklahoma City, OK 73118
800-259-6863 www.okumf.org



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Putting the Pieces Together

A Guide to Planned Giving



The Oklahoma United Methodist Foundation

YOUR GIFT	YOUR GOAL	HOW IT WORKS	YOUR BENEFITS
Bequest	<ul style="list-style-type: none"> • Maintain control of your assets during life • Make a gift to your church at your death 	You designate the Foundation or your church as the beneficiary of your asset by will, trust or other instrument.	<ul style="list-style-type: none"> • Estate tax charitable deduction • Life use and ownership of your property
Charitable Gift Annuity	<ul style="list-style-type: none"> • Receive fixed income for life • Avoid capital gains tax on the sale of your appreciated property • Enjoy the benefit of tax savings from a charitable deduction 	You transfer your cash or appreciated property to the Foundation in exchange for fixed income (with rates based on your age) for the rest of your life.	<ul style="list-style-type: none"> • Charitable tax deduction • Fixed income for life • Partial bypass of capital gain • Possible tax-free payments
Charitable Remainder Trust (CRT)	<ul style="list-style-type: none"> • Transfer your appreciated property without paying capital gains tax • Enjoy regular income for life or a term of years • Receive the benefit of tax savings from a charitable deduction 	You transfer your cash or appreciated property to fund a charitable trust with the Foundation. The trust sells your property tax-free and provides you with income for life or a term of years.	<ul style="list-style-type: none"> • Charitable tax deduction • Income for life or a term of years • Possible income growth over time • Avoidance of capital gains tax
Charitable Lead Trust (CLT)	<ul style="list-style-type: none"> • Give cash or property to your family in the future • Avoid substantial gift or estate tax 	You transfer your cash or property to fund a lead trust that makes a gift to the Foundation for a number of years. You receive a charitable deduction for the gift. Your family receives the remainder at substantial tax savings.	<ul style="list-style-type: none"> • Gift or estate tax deduction • Asset and appreciation passes to family at a reduced cost
Life Estate Reserved	<ul style="list-style-type: none"> • Remain in your home for life. • Receive a charitable income tax deduction 	You give your property to the Foundation but retain the right to use the property during your life.	<ul style="list-style-type: none"> • Charitable tax deduction • Lifetime use of property
Bargain Sale	<ul style="list-style-type: none"> • Transfer your property and receive cash or debt relief without paying substantial taxes 	The Foundation purchases your property for less than fair market value. You receive the cash and a charitable deduction for the difference between the market value and purchase price.	<ul style="list-style-type: none"> • Cash from sale • Charitable tax deduction • Partial bypass of capital gain

