



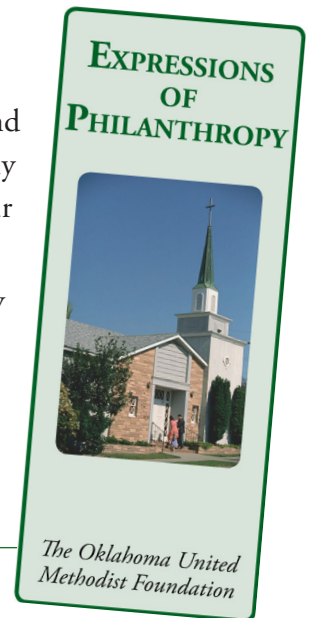
Planting Seeds Orientation

An overview of charitable giving and frequently asked questions

Charitable Giving

This quarter's theme introduces your church members to charitable giving beyond normal tithes and offerings. These gifts are called planned gifts because they usually require some advance planning and often require the advice and strategic input of your professional advisors such as your attorney or CPA.

Many people in your church make financial gifts on a weekly, monthly or quarterly basis as their tithes and offerings through their monthly income. Planned gifts, however, are usually made only once or a few times in a lifetime and are often the largest financial gifts a person will make.



Frequently Asked Questions

Why should I make a planned gift?

You should make a planned gift if you wish to fund specific ministries or church needs over an extended period of time. United Methodists often leave a portion of their estate to their church and the ministries they love. An endowment or legacy gift serves as a witness to their foresight and commitment to ministry.

Are planned gifts better than cash in the offering plate?

Gifts placed in the offering plate and gifts made through your will or trust are not "either/or" choices. They are different kinds of gifts with different purposes. Planned gifts are an extension of your spiritual and charitable generosity.

Is there a minimum gift to make a planned gift?

There is no minimum amount! You may create a gift now and add to it over the years and at special occasions. One factor to keep in mind about gift size is this: if your gift is an endowment where only the earnings are distributed and principal is preserved, then you want a principal amount large enough to provide your desired support to your cherished ministry.

What ministries or charities can I support with a planned gift through the Foundation?

You can support any 501(c)3 charitable organization, although at least 25% of your gifts must benefit United Methodist causes. You may even divide your gift's distribution across several charities.

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A Personal Story

David and Nancy were dedicated volunteers at their local United Methodist church. Over the years, they witnessed many individuals impacted by the work of their church. They wanted to create a legacy to provide future support to continue the church's mission.

They felt their church and the many ministries offered were important to them and the community, and wanted to do more than their current gifts. They received the Oklahoma United Methodist Foundation's newsletter and noted they could make a gift from their estate to benefit their church's ministries.

David and Nancy met with an attorney to revise their wills and each included a bequest to their church through the Foundation. The bequest was easy to arrange and permits them to still use their assets during while they are still living. They will continue to make gifts to their church and enjoy the satisfaction of knowing their support will help in the future.

Please note: This story is representative of a typical donor and may or may not be an actual donor to the Foundation.

Sample Bequest Language for Your Attorney

A gift through a bequest may be made several different ways. Below are three sets of suggested wording to include your church in your will. Please discuss and share these options with your attorney.

Specific Percentage of Estate

I give and bequeath to The Oklahoma United Methodist Foundation, Inc., an Oklahoma, not-for-profit, tax-exempt corporation, as a permanent endowment, ___ percent of my gross estate, for the benefit of *(name of church institution(s) or local church)*.

Specific Amount of Estate

I give and bequeath to The Oklahoma United Methodist Foundation, Inc., an Oklahoma, not-for-profit, tax-exempt corporation, as a permanent endowment, \$___ to be used for the benefit of *(name of church institution(s) or local church)*.

Bequest of the Residue

All the rest, residue, and remainder of my estate, both real and personal, I give, devise and bequeath to The Oklahoma United Methodist Foundation, Inc., an Oklahoma, not-for-profit, tax-exempt corporation, as a permanent endowment, for the benefit of *(name of church institutions(s) or local church)*.