

Christ Church United Methodist
Louisville, Kentucky

Leaving your Legacy



Christ Church Endowment Fund



*Now this I say, he who sows sparingly
shall also reap sparingly and he who sows
bountifully shall also reap bountifully.
2 Corinthians 9:6*



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Louisville, KY 40207
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Stamp

Attn: Accounting/Financial Office
Christ Church United Methodist
4614 Brownsboro Road
Louisville, KY 40207

Tear off to mail back or deliver.

Name: _____

Address: _____

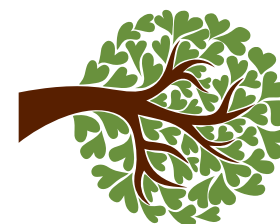
Telephone: _____ (Home / Office / Cell - Please circle one)

Email: _____

Please check the appropriate box:

☐ I would like more information on Planned Giving.

☐ I would like a confidential consultation with a church representative.



Types of Gifts

Charitable Remainder Trust

Established either during your lifetime or at your death. A spouse or other family member receives a set percentage (at least 5%) of the trust value each year for either a set term of years or the later death of the beneficiary. Then at the conclusion of the set term or at death, it passes to the Endowment Fund. Retirement accounts are excellent to tie into this approach and income taxes are generally avoided.

Charitable Lead Trust

This pays a set percentage of its value, selected by you, to the Endowment Fund, for a period of years, and then passes to one or more designated family members after that. Families can use this technique to effectively make gift tax free transfers.

Memorial Gifts

You contribute during your lifetime or at death in the name of a loved one and Christ Church will maintain a permanent record of this. The Endowment Fund is an excellent way to accomplish this.

Legacy Gifts

All legacy commitments in your estate plan made known to Christ Church will be maintained and recognized each All Saints Day and can be done (unless you prefer otherwise) even during your lifetime. Likewise, the Endowment Fund is a great choice for this.

Planned Gifts

Using the Christ Church Endowment Fund for your lifetime giving or for your estate plan is a wonderful way of expressing your love of God and for the Church's mission. The Fund holds and invests its assets for the future while only distributing a set % of its value (currently 4%) each year for church operations. Using the Endowment Fund provides your legacy for future generations while achieving excellent tax results.

Simple Options

Naming the Christ Church Endowment Fund as a beneficiary is all it takes and is amendable by you at any time using the following vehicles:



Will

Trust

Life Insurance Policy

Retirement Account

You may elect all or a portion to go to the Endowment Fund. For retirement accounts, all income tax to you or your heirs on this gift is avoided.

What to Give

In addition to using life insurance or retirement accounts, you may gift **cash**, **securities** or **real estate** with appreciation in value normally avoiding a capital gains tax while providing a full income or estate tax deduction to you.