

For More Information

☐ I would like to speak with someone who can provide additional information.

☐ I would like to receive information on other charitable gift planning options.

Name _____

Address _____

City _____

State & Zip _____

Church _____

Phone _____

E-Mail _____

MAIL TO:

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

**All inquiries are treated with complete
confidentiality**

Leaving a legacy

Your gifts to your local United Methodist church or favorite ministry's endowment program can be carried far into the future. Through your gifts, you can leave a lasting legacy of your life, that of a parent, child or other loved one, while helping to endow the ministries of our United Methodist Church.

Your gifts can be designated by you to fund a specific ministry or left undesignated to meet future needs as determined by your church's leadership. Through your generosity, you can secure the future of our church's ministry for tomorrow's youth and adults.

Your gifts will help your family witness the eternal importance you have given to the Lord's work & represent a tribute of your spiritual heritage at your church home.

Visit us online at www.okumf.org for more information on planned giving.



Invest in Lasting Good

OKLAHOMA METHODIST FOUNDATION
4201 N CLASSEN BOULEVARD, OKLAHOMA CITY, OK 73118
WWW.OKUMF.ORG • 800-259-6863 • 405-525-6863

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A Guide to Giving



Oklahoma Methodist
Foundation



Which type of gift fits your needs?

Each year the generous spirit of donors makes the work of our United Methodist churches and ministries possible. This generosity is evident in countless ways, including financial support. There are many ways people make charitable gifts and careful planning will ensure your desires are met. Below is an overview of the most common ways to make a gift with an explanation of the benefits to you and the beneficiary of each.

	Type of Gift	Benefits	Beneficiary
Gifts that pay you income	Charitable Gift Annuity	Current income tax deduction Portion of payments may be tax free Fixed and predictable payments	One or two annuitant beneficiaries Your church or ministry is future residual beneficiary
	Charitable Remainder Trust	Current income tax deduction Bypass capital gains tax Diversification of investments Payments for life and/or term of years	One or more income beneficiaries Your church or ministry is future residual beneficiary
Gifts that can be used today	Outright	Current income tax deduction Bypass capital gains tax Enjoy the gift during your lifetime	Your church or ministry is the immediate beneficiary
Gifts that take effect after your lifetime	Bequest	Charitable deduction for taxable estates Allows you to make a large gift at no immediate cost to you	Your church or ministry is the future beneficiary
	Life Insurance	Allows you to make a large gift at little cost to you	Your church or ministry is the future beneficiary
	Retirement Plans	Avoid double taxation of retirement assets The Foundation applies the full amount of plan assets to the church or ministry you choose	Your church or ministry is the future beneficiary
	Retained Life Estate	Current income tax deduction Potential estate tax savings	You retain lifetime beneficial use of property Your church or ministry receives future rights to property