

OTHER OPTIONS

Work with your advisor to create a Charitable Gift Annuity, Charitable Lead Trust or Charitable Remainder Trust.

INVEST IN WHAT YOU VALUE TAKE CARE OF WHAT YOU LOVE

The United Methodist Stewardship Foundation of Greater New Jersey serves the financial stewardship and investment needs of churches by investing, growing and funding ministry to make disciples of Jesus Christ for the transformation of the world.

Our investment policy follows the Socially Responsible Investing practices of the United Methodist Church.



INFORMATION FOR YOUR ADVISORS

- The legal name and tax identification number from your church.
- Suggested language for an undesignated gift such as: *I bequeath the sum of (\$_____) to the (name of local church) to be used or disposed of as its Board of Trustees in its sole discretion deems appropriate.*
- Suggested language for a specific percentage of the remainder of your estate such as: *I devise and bequeath (all) or (____%) of the remainder of my estate to the (name of local church) to be used or disposed of as its Board of Trustees in its sole discretion deems appropriate.*

FOR MORE INFORMATION, CONTACT

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A GUIDE TO PLANNED GIVING



UNITED METHODIST
STEWARDSHIP FOUNDATION
OF GREATER NEW JERSEY



PLANNED GIVING

Your gift to your local United Methodist Church will help build on and extend the congregation's ministry for generations to come. Your investment is the best way to take care of the place in which you worship and have built your family's spiritual foundation.

There are many ways to make a charitable contribution to your church. Speak with your financial or legal advisor to learn the latest about the many tax benefits of planned gifts.

Contact your treasurer to discuss how you wish your gift to be put to use and recognized.

DONOR ADVISED FUNDS

Establishing a DAF allows you to reap immediate and future tax benefits while creating a long-term structure for supporting your UMC church and missions, as well as other charities. Simplify your annual giving and eliminate paperwork with a DAF through the Stewardship Foundation, starting at \$7,500 in cash, stocks or assets.

GIFTS OF CASH

Cash, check or credit card contributions are quick and easy ways to invest in what you love. Pay all at once or set up a pledge payment plan for your gift over the next one to five years.

GIFTS OF STOCK

A gift of appreciated stock can have greater tax benefits than gifts of cash. Speak with your advisor to see if donating stock when rebalancing your portfolio is a good option for paying it forward to your church.

GIFTS OF RETIREMENT PLANS

You can name your church as a partial or full beneficiary of your pension, 401k, 403b, IRA or other retirement plan. Your plan's administrator will provide you with the beneficiary designation forms you need to make this legacy gift.

GIFTS OF LIFE INSURANCE

You can name your church as a whole or partial beneficiary of your policy.

BEQUEST

By leaving a bequest in your will, you can continue to protect and preserve the church you love for generations to come. Your bequest can be a specific amount or a percentage of your estate and will be paid after other bequests, such as to your family have been made. Sample language can be found on the back page of this brochure or contact us to discuss ways in which you may designate or endow your gift.

LIVING TRUSTS

Through a living trust, you can provide for yourself and your family before and after your death. You can arrange a contribution through a living trust by naming your church as a beneficiary.

