

# Giving with the Foundation

The Georgia United Methodist Foundation delivers advanced faith-based planned giving solutions that elevate the mission of and ministry of your United Methodist church or agency.

## Who We Are

- Leading financial partner to Georgia-based United Methodist churches, agencies, districts, conferences, and individuals
- 501(c)(3) not-for-profit agency of The United Methodist Church
- Our mission is to provide faith-based financial solutions for investing, lending, training, and planned giving
- Total assets entrusted to our care: \$251 million<sup>1</sup>
- Fifth largest United Methodist foundation in the U.S.
- Dedicated team of nine professionals

## Solutions Offered

- Institutional Investments
- Loans for Churches and Agencies
- Certificate Investments
- Endowments and Legacy Ministry Programs
- Wills Clinics
- Cemetery Associations
- Clergy Financial Literacy Academy
- Scholarships



### Not-for-Profit

The Foundation is an agency of the UMC. Our purpose is to partner with UM congregations, organizations, and families in direct support of the ministries and mission of the church.



### Longevity

The Foundation brings more than 40 years of experience serving Georgia UM institutions. A dedicated team of nine industry veterans brings the strength of experience.



### Trusted Partners

The Foundation gives thanks to God and to you for the 600+ relationships we have with Methodists across the State of Georgia.



### Giving Back

The Foundation impacts lives through our ministries. We fund scholarships and grants and have awarded 853 scholarships totaling \$726,700 since 2011.



### Aligned Missions

The Foundation helps sustain ministry through our investments, supports the mission of the UMC, and fulfills ministry with a more secure financial future.

<sup>1</sup> As of March 31, 2022.

## Ways to Give with the Foundation

The Georgia United Methodist Foundation can help you make a planned gift to support your United Methodist church or a charity close to your heart. Talk with your financial advisor or estate planning attorney to decide what you want to give and how you want to give it. Then contact the Foundation to complete the gift. Here are some gift ideas to get you started.

GIVING OPTIONS	HOW TO GIVE	BENEFITS TO DONOR
1. <b>Cash</b>	Write a check.	May receive an itemized deduction.*
2. <b>Appreciated Stock Held More Than One Year</b>	Transfer stock to your church, charity, or the Foundation's brokerage account.	May receive an itemized deduction for full market value.* Avoids capital gains tax.
3. <b>Qualified Charitable Distribution From Your IRA</b>	Transfer distribution directly to your church, charity, or the Foundation.	Avoids income tax on distribution.
4. <b>Real Estate</b>	Transfer title to your church, charity, or the Foundation.	Full market value of gift may receive itemized tax deduction.*
5. <b>Donor-Advised Fund</b>	Set up a fund with the Foundation. Give cash/investments, etc. to the fund.	Immediate tax deduction for fair market value. Distributions can be requested later.*
6. <b>Life Insurance</b>	Change beneficiary designation to include your church or charity for all or part of the proceeds.	May be able to deduct present value of gift.*
7. <b>Retirement Plan Assets</b>	Designate your church or charity as beneficiary for all or part of the proceeds.	May be able to deduct present value of gift.*
8. <b>Will or Estate Plan</b>	Leave gifts to your church or charity in your will or estate plan.	May avoid estate taxes.
9. <b>Charitable Gift Annuity</b>	Donor purchases an annuity contract, which obligates the Foundation to make payments for a specific period. Any remainder is given to the Foundation or a designated charity.	May be tax deductible. Consult an advisor.
10. <b>Charitable Remainder Unitrust</b>	Donor creates a trust where a percentage of the value of the trust is distributed annually based upon the market value of the fund. Remainder is given to charity.	May be tax deductible. Consult an advisor.
11. <b>Charitable Remainder Annuity Trust</b>	Donor sets up an annuity trust, which provides regular payments to donor/designee for a specific time. Remainder is given to charity.	May be tax deductible. Consult an advisor.

*\*The tax deductibility of gifts depends on whether the donor can itemize on their tax return. Please check with your professional advisor.*

*The purpose of this guide is to provide general gift, estate, and financial planning information. State laws govern wills, trusts, and charitable gifts made in a contractual agreement. Advice from legal counsel should be sought when considering these types of gifts. Watch for tax revisions. Some types of gifts may not be available in Georgia. Please check with your professional advisor.*

## Contact Us

For more information, visit [gumf.org](http://gumf.org) or contact:



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