



9 Ways to Give with the Foundation

The Georgia United Methodist Foundation provides faith-based financial solutions for planned giving. We can help you make a 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 **Mathew A. Pinson**, GUMF President and CEO, at 770-449-6726 or mpinson@gumf.org or **Dr. Rick Lanford**, GUMF Regional Vice President (South Georgia), at 478-256-7130 or rlanford@gumf.org to complete the gift. Here are some gift ideas to get you started.

GIFT	HOW TO GIVE	BENEFITS TO DONOR
1) Cash	Check	May receive an itemized deduction.*
2) Stock/Investment Assets	Transfer ownership to your church or charity.	May receive an itemized deduction for full market value.* Avoids capital gains tax on gain.
3) Charitable IRA Distribution	Transfer distribution to your church or charity.	Avoids income tax on distribution.
4)a Real Estate	Transfer title to your church or charity.	Full market value of gift may receive itemized tax deduction.*
4)b Real Estate with Retained Life Interest	Give to your church or charity.	May be able to deduct some value of gift.*
5) Donor-Advised Fund	Set up a fund with GUMF. Give cash/investments, etc. to fund.	Immediate tax deduction for fair market value. Distributions can be requested later.*
6) Life Insurance	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) Retirement Plan Assets	Designate your church or charity as beneficiary for all or part of the proceeds.	May be able to deduct present value of gift.*
8) Will or Estate Plan	Leave gifts to your church or charity in your will or estate plan.	May avoid estate taxes.
9) Trusts, Etc.	Set up a trust and put assets into it.	May include tax deductions.
9)a Charitable Gift Annuity	Donor purchases an annuity contract which obligates GUMF to make payments for a specific period. Any remainder is given to GUMF or designated charity.	May be tax deductions for present value of the estimated remainder.
9)b Charitable Remainder Unitrust	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 deductions for present value of the estimated remainder.
9)c Charitable Lead Unitrust	Donor creates a trust that pays a fixed or variable payment to church or charity. Remainder goes to heirs.	May reduce size of taxable estate. Allows for scheduled rather than lump sum payments.

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

Why Choose the Foundation as Your Planned Giving Partner?

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: \$248 million
- Fifth largest UM 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

GUMF 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

GUMF 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

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



Giving Back

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



Aligned Missions

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

Contact Us

For more information, visit gumf.org or contact:



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