Gift Planning Allows Your Legacy and Your Connection to United Methodist Women to Live On

1869 Society

February 2016 United Methodist Women
National Board of Directors

Gift Planning...
With a planned gift you create your personal legacy by supporting United Methodist Women in those areas you care about most. You choose the method of giving that is best for you, your family and loved ones. United Methodist Women is presently emphasizing gifts to The Legacy Fund, to help ensure the long-term viability of the organization.

The 1869 Society

In recognition of our founding year, the 1869 Society has been established to thank and honor individuals who have named The Legacy Fund of United Methodist Women as a beneficiary of a will, trust, gift, retirement plan or life insurance policy.

The Legacy Fund

The Legacy Fund is a forward-thinking permanently restricted endowment with income dedicated to strengthening United Methodist Women. The total program of United Methodist Women is mission. United Methodist Women service, advocacy and transformative learning opportunities equip members to be agents of change and promote the empowerment of women that is essential to address the root causes of so many conditions that harm women, children and youth.

The Legacy Fund will provide the tools, resources and personnel to distribute United Methodist Women’s grants and scholarships, coordinate with and fund mission personnel and support technological updates such as operating systems for data, communication and more. Ensuring a regular source of support for these core expenses will free future generations to budget Mission Giving to connect directly with the needs of women, children and youth. It will allow our successors to promote Mission Giving in a new way.

Why a Planned Gift to United Methodist Women?

A planned gift not only supports the mission of United Methodist Women, it may provide valuable tax benefits to you. For example, the charitable deduction for gift and estate taxes may reduce taxes owed by you or your estate. Bequests of certain resources, such as retirement plan assets, may provide particular tax benefits by disposing of an asset taxed at a typically higher rate. A planned gift can also memorialize a loved one. Be sure to seek professional tax advice before making a sizable gift.

The Impact of Planned Giving

Planning ahead empowers you to have a greater impact than you might think is possible. Your planned gift to United Methodist Women will make a difference in the lives of women, children and youth today, tomorrow and beyond. Your planned gift to The Legacy Fund in particular will help ensure the long-term success of United Methodist Women as an organization. Even a modest-sized gift can have enormous impact. Gifts sustain the total program of the organization, including mission-focused spiritual growth, transformative education and service and advocacy work that meets the needs of women, children and youth in communities near and far.
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"Give what you have decided in your heart to give...for God loves a cheerful giver."

2 Corinthians 9:7 (NIV)

Steps to Make a Planned Gift to United Methodist Women:

• Contact the United Methodist Women Development Office at 212-870-3705 to speak confidentially to a development officer about your giving options. Or email us at Legacy150@unitedmethodistwomen.org for more information. You can find additional planned giving information online at umwgift.org.

• Meet with your attorney and financial advisor. Let them know you are considering making a planned gift to United Methodist Women. They can assist you in determining what type of gift best suits your personal and financial circumstances. Our tax ID number is 13-5565087. Our formal corporate name is United Methodist Women. United Methodist Women is a 501(c)(3) charitable religious organization.

• Be sure to talk with your loved ones about your plans, personal wishes and planned gift options. It is important that you first secure the well-being of yourself and your loved ones before considering a gift to United Methodist Women.

Unrestricted gifts are especially valuable to United Methodist Women because they allow us to fulfill the organization's highest priorities and greatest needs.

I give and bequeath (a) the sum of $______________; or (b) _____% of my estate; or (c) the rest, residue, and remainder of my estate to United Methodist Women, a New York Not-for-Profit Corporation, 475 Riverside Drive, 15th Floor, New York, New York 10115 for its general purposes.

Gifts to The Legacy Fund will provide United Methodist Women with ongoing support into the future.

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Restricted gifts allow you to support a particular program or purpose you might have in mind. Please contact the development officer if you would like to designate your gift to a specific area or program other than The Legacy Fund. We can provide you with the appropriate language to ensure your gift can be used as you intend.

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Should you wish to designate your gift as a memorial, please add the phrase: "to be known as the ________ Memorial," to the suggested language above.

Ways To Give/Planned Giving: unitedmethodistwomen.org/150/give#plan

Learn more at: unitedmethodistwomen.org/150/home
Types of Planned Gifts:

**Cash Gift or Pledge**
You can make a cash gift or pledge, payable all at once or over a period of time, which continues your annual support, funds a specific program or initiative or simply makes an unrestricted gift to support United Methodist Women.

**Bequest or Estate Gift**
You can designate United Methodist Women as a beneficiary to receive a specific amount, all or a part or a percentage of the remainder of your estate after you provide for your loved ones. Please see the back panel for suggested wording you may want to discuss with your financial adviser.

**Assets or Property**
You can make a gift to United Methodist Women of all or a percentage of your assets, including your home or property sale proceeds.

**Appreciated Securities**
Giving long-term appreciated stock is one of the most tax-advantaged ways to make charitable gifts. With careful planning, you can reduce or eliminate capital gains tax while supporting United Methodist Women.

**Retirement Fund**
You can designate United Methodist Women as a beneficiary to receive all or part of your retirement fund. Planned giving may help reduce the income and estate tax liability associated with retirement funds.

**IRA Charitable Rollover Gift**
If you are age 70 1/2 or older, you can consider making a direct transfer gift to United Methodist Women of up to $100,000 from your individual retirement account (IRA), without that donation counting as taxable income. *Note: This is accurate as of the writing of this brochure, October 30, 2019.*

**Endowment Fund**
You can contribute to a permanently restricted endowment fund like The Legacy Fund that provides annual income in perpetuity to carry forward the mission of United Methodist Women.
Donor-Advised Funds

If you have a Donor-Advised Fund managed by a public charity, you can make a charitable donation to the Fund and receive an immediate tax deduction, and then recommend funding to United Methodist Women.

Matching or Workplace Giving

Check with your employer (or former employer, if you are retired) to see if you can multiply your support to United Methodist Women through a matching gift or contribution through a workplace giving campaign.

“I am seeing a generation of young girls who are going to need United Methodist Women and its PURPOSE as much as I have. I would like to help ensure that they will have a strong organization that will help them grow in faith, become the whole persons they are called to be, be part of a supportive community and encourage their commitment to social action. I hope that generations of young women will experience the opportunities for growth and service that we who have been part of this 150th Anniversary Celebration have experienced!”

Sue Raymond, United Methodist Women Board of Directors

United Methodist Women is a 501(c)(3) charitable religious organization. Contributions to United Methodist Women are tax-deductible to the extent provided by the law. This is not professional or legal or tax advice. Consult your legal and tax advisors regarding making a planned gift to United Methodist Women.
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Sample bequest language to discuss your estate plan with your financial advisers.

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