

Request for Gift Illustration and/or Information

Please send me a gift calculation based on the following confidential information, without any obligation on my part, for a:

- UCC Gift Annuity
 UCC Pooled Income Fund
 UCC Charitable Remainder Trust

Please send me information on Bequests

Name _____

Address _____

City _____

State _____ Zip _____

Estimated value of gift: \$ _____

Fund by: Cash Appreciated securities

Trust Will Other

Birth date of 1st Life Income Beneficiary:

Birth date of 2nd Life Income Beneficiary:

Proposed Charitable Beneficiary(ies)
(must be at least 50% UCC-related):

We strongly encourage consultation with an independent financial/estate planning advisor.

Assuring that future needs will be met

Ways to give

Current or Outright Gifts by means of cash, transfer of appreciated securities, or real estate.

UCC Gift Annuities, whereby the donor receives a fixed rate of return based on age, with a one-time charitable deduction and some tax free income. Minimum gift is \$1,000.

UCC Pooled Income Fund provides a variable rate of return based on a donor's share of the Fund's earnings; a one-time charitable deduction; all income taxed at the ordinary rate. Minimum gift is \$2,000.

Charitable Remainder Trusts are of two types: Unitrusts pay variable income based on a payout percentage, usually 5%, of the Trust's annual value; Annuity trusts pay fixed income based on a percentage, usually 5%, of the original gift amount. Donor receives a one-time charitable deduction. Minimum gift is \$50,000.

Life insurance, whereby the insured names the church either as beneficiary or as owner/beneficiary of the policy, or gifts a paid-up policy to the church.

IRA assets, whereby the donor names the church as beneficiary of her/his IRA, possibly avoiding estate taxes.

Bequest by Will, preferably by percentage, designating the church as primary or contingent beneficiary.

For more information about United Church of Christ Planned Gifts, contact:

**THE UNITED CHURCH OF CHRIST
OFFICE OF PHILANTHROPY
AND STEWARDSHIP**
700 Prospect Ave. E
Cleveland, OH 44115-1100
Phone: (800) 846-6822
Fax: (216) 736-2297
E-mail: giving@ucc.org
Website: www.ucc.org/giving

Current Gift Annuity rates can be accessed through the UCC Office of Philanthropy and Stewardship web page at www.ucc.org/giving or the American Council on Gift Annuities web site at www.acga-web.org

UCC life-income gifts are invested with United Church Funds -- visit the website at www.unitedchurchfunds.org

God is still speaking,
**UNITED CHURCH
OF CHRIST**



Legacy Giving



IN THE UNITED CHURCH OF CHRIST

The true meaning of life is to plant trees, under whose shade you do not expect to sit.'

-- Nelson Henderson

**A BRIEF GUIDE TO
UNITED CHURCH
OF CHRIST
PLANNED GIVING
FOR YOU AND
YOUR FAMILY**

Leaving more than an empty pew through a planned gift

Place
STAMP
Here

Stewards of accumulated assets

As people of faith, we are called to be good stewards of the assets with which we have been entrusted. This calls for faithful financial and estate planning for ourselves and families to assure that future needs will be met. It also means considering how we will be providing for the church that we have loved and served during our lifetime, in order that it remain vital in the future. One way you can accomplish both of these important goals is through a Planned Gift.



WHETHER IN HAWAII, NEW ENGLAND, OR IN BETWEEN, A PLANNED GIFT ALLOWS CHURCH MEMBERS TO HELP PROVIDE FOR THE CHURCH THEY LOVE.

What is a 'Planned Gift'?

A Planned Gift is one that is planned for and frequently funded during the donor's lifetime but not actually received by the church until after the donor's death.

Planned Gifts are generally made from accumulated assets in a carefully considered manner and in an amount that expresses one's commitment, but does not impair the family's financial well being. This means giving at the appropriate time, considering personal and family requirements, the church's needs, and tax implications. Further, it involves deciding on the best asset to give whether it be in the form of cash, transfer of appreciated securities (stocks, bonds, mutual funds), or real estate.

Witness ...

A couple from Tennessee have funded eight Deferred Payment Gift Annuities over the past seven years, to support their retirement income and the UCC-related retirement community in which they live.

A Pennsylvania member has established 10 Gift Annuities to benefit her church and a UCC-related college.

A missionary couple, being supported by predecessors of Global Ministries while serving alongside overseas partners, were deeply conscious of the fact that though their family's salary was not high by U.S. standards, it far exceeded the incomes of the people they were partnering with. They requested that a percentage of their salary be withheld and, as sufficient funds accumulated, they established Pooled Income Fund gifts and Charitable Gift Annuities. Assets inherited from a parent's estate also were transferred into deferred gifts. They now have established a total of 15 gifts, thereby locking in future support to the mission and ministry that is important to them, and also creating a supplement to their retirement income.

Witness ...

A couple in Maine established a Charitable Remainder Unitrust more than 10 years ago and have made annual additions to it; this Unitrust will provide significant future support to several churches, conferences, national ministries, and non-UCC-related organizations.

Our classic donor story regards the California clergyman who, during his lifetime, funded a total of 142 Gift Annuities and Pooled Income Fund gifts! He lived a life of deeply intentional personal stewardship, and while most of his



A PLANNED GIFT CAN HELP PROVIDE FUNDS FOR FUTURE MISSION AND MINISTRY IN THE UNITED CHURCH OF CHRIST.

gifts were in the minimum funding amount, they added up over time to significant support for UCC Global Ministries work and the Council for American Indian

Ministries (his two most often-named charitable remainder beneficiaries). Many of his gifts were paid out at the time of his death, and others are still providing income to other life beneficiaries.

We strongly encourage consultation with an independent financial/estate planning advisor.

UCC Office of Philanthropy and Stewardship
700 Prospect Ave. E
Cleveland, OH 44115-1100

