



## PLANNED GIVING OPPORTUNITIES

**UCC Life-Income Gifts:**  
Receive income for life and make a future gift to your church!

*A Planned Gift is one you make during your lifetime, but which benefits a charitable organization after your death (a bequest in your will is the most common example).*

The United Church of Christ (UCC) Financial Development Ministry specializes in assisting donors to establish **life-income gifts** which include the following benefits:

- Income for your lifetime with no investment management responsibilities.
- Income for a surviving loved one.
- A charitable tax deduction, if you itemize.
- Tax savings on long term capital gains.
- Financial support for future ministry in the many settings of the UCC. You may designate your congregation, association, or conference; UCC-related college, seminary, or health and human services institution; or a UCC national ministry as the recipient of your gift.

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# Life-Income Gift Opportunities

**A UCC GIFT ANNUITY** is a contract whereby you transfer assets such as cash or appreciated securities to the UCC in return for age-based, lifetime annual payments of a fixed amount. You are entitled to a charitable contribution tax deduction in the year you make the gift if you itemize your tax return, and part of your annual payment may be tax free. If you transfer appreciated securities to fund your gift, you may have significant capital gains tax savings.

**The UCC POOLED INCOME FUND** combines your contribution with others into a large fund, the net income of which is distributed to you based upon your share of the fund. You are entitled to a charitable tax deduction in the year you make the gift if you itemize your tax return. If you transfer appreciated securities to fund your gift, you may have significant capital gains tax savings.

**With CHARITABLE REMAINDER TRUSTS**, you transfer cash, securities or other property into an irrevocable trust and receive lifetime income. A Unitrust pays flexible income, based on a percentage (usually 5%) of the trust's fair market value as determined annually. An Annuity Trust pays fixed income, based on a percentage (usually 5%) of the original gift amount. You are entitled to a charitable tax deduction if you itemize, and you can realize capital gains tax savings if you fund your gift with appreciated securities.

For more information about these gifts, and to receive a personalized gift illustration, please contact:

**UCC Financial Development Ministry**  
**Toll-free phone: (800) 846-6822**  
**E-mail: [giving@ucc.org](mailto:giving@ucc.org)**



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