

Planned Giving Overview

The goal of planned giving is to help you maximize your charitable gifts in a way that allows you and your family to enjoy tax and income benefits.

This brochure provides you with an overview of your planned giving options. If you have questions, please contact the Rocky Mountain United Methodist Foundation. We look forward to helping you.

Jesus said, "For where your treasure is, there your heart will be also."

Matthew 6:21 and Luke 12:34

I have reviewed your brochure on Planned Giving and:

- I would like to speak with someone who can provide additional giving information.
- I would like to receive information on other charitable giving methods.

Name _____

Street _____

City _____

State/Zip _____

Home Phone _____

Work Phone _____

E-mail _____

(Please complete and return. All inquiries are treated with complete confidentiality.)

This information is not intended as tax, legal or financial advice. Gift results may vary, consult your personal financial advisor for information specific to your situation.



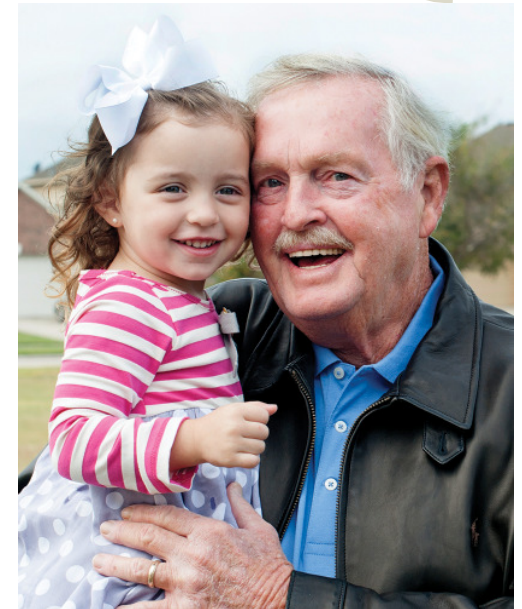
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ROCKY MOUNTAIN

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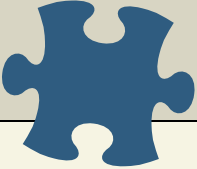

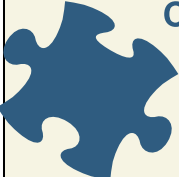



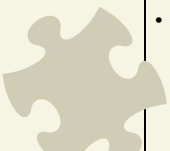

Understanding Planned Giving

An Overview of Giving Options



"Since you excel in everything - in faith, in speech, in knowledge, in complete earnestness and the love we have kindled in you - see that you also excel in this grace of giving."

2 Corinthians 8:8-9 NIV

YOUR GIFT	YOUR GOAL	HOW IT WORKS	YOUR BENEFITS
 <p>Bequest</p>	<ul style="list-style-type: none"> • Maintain control of your assets throughout your life • Make a charitable gift upon your death 	<p>You designate your church and/or the Rocky Mountain United Methodist Foundation as the beneficiary of your assets by will, trust or other instrument.</p>	<ul style="list-style-type: none"> • Estate tax charitable deduction • Life use and ownership of your property
 <p>Charitable Gift Annuity (CGA)</p>	<ul style="list-style-type: none"> • Receive fixed income for life • Avoid capital gains tax on the sale of your appreciated property • Enjoy the benefit of tax savings from a charitable deduction 	<p>You transfer your cash or appreciated property to the Rocky Mountain United Methodist Foundation in exchange for our promise to pay you fixed income (with rates based on your age) for the rest of your life.</p>	<ul style="list-style-type: none"> • Charitable tax deduction • Fixed income for life • Partial bypass of capital gain • Possible tax-free payments • Church designated as beneficiary
<p>Charitable Remainder Trust (CRT)</p>	<ul style="list-style-type: none"> • Transfer your appreciated property without paying capital gains tax • Enjoy regular income for life or a term of years • Receive the benefit of tax savings from a charitable deduction 	<p>You transfer your cash or appreciated property to fund a charitable trust. The trust sells your property tax-free and provides you with income for life or a term of years.</p>	<ul style="list-style-type: none"> • Charitable tax deduction • Income for life or a term of years • Possible income growth over time • Avoidance of capital gains tax • Church receives remainder
 <p>Charitable Lead Trust (CLT)</p>	<ul style="list-style-type: none"> • Give cash or property to your family in the future • Avoid substantial gift or estate tax 	<p>You transfer your cash or property to fund a lead trust that makes a gift to your church or the Rocky Mountain United Methodist Foundation for a number of years. You receive a charitable tax deduction for the gift. Your family receives the remainder at substantial tax savings.</p>	 <ul style="list-style-type: none"> • Gift or estate tax deduction • Asset and appreciation passes to family at a reduced cost
 <p>Life Estate Reserved</p>	<ul style="list-style-type: none"> • Remain in your home for life. • Receive a charitable income tax deduction 	<p>You give your property to the Rocky Mountain United Methodist Foundation but retain the right to use the property during your life.</p>	 <ul style="list-style-type: none"> • Charitable tax deduction • Lifetime use of property
<p>Bargain Sale</p> 	<ul style="list-style-type: none"> • Transfer your property and receive cash or debt relief without paying substantial taxes 	<p>We purchase your property for less than fair market value. You receive the cash and a charitable deduction for the difference between the market value and purchase price.</p>	 <ul style="list-style-type: none"> • Cash from sale • Charitable tax deduction • Partial bypass of capital gain