

**LEGACY IS NOT WHAT WE HAVE, BUT WHAT WE LEAVE BEHIND FOR THOSE WE LOVE AND WANT TO INSPIRE.**



## WHAT

**Planned Legacy Giving** encompasses a variety of ways that gifts can be made to the church from accumulated resources.

**Planned Legacy Giving** usually involves financial or estate planning, but it is not reserved for the wealthy. It is a means where anyone concerned with the wise use of his or her personal wealth makes a considered choice about how it is distributed.

**Planned Legacy Giving** includes gifts you can make now, gifts you can defer, and gifts that provide a lifetime income.

**Planned Legacy Giving** can be made through: Your will; Special assets (stocks, life insurance, retirement accounts); Life income gifts (charitable gift annuity, charitable remainder trusts, etc.).

## FOR MORE INFO

Carlisle United Methodist Church  
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[www.carlislepaumc.org/legacy](http://www.carlislepaumc.org/legacy)

# PLANNED LEGACY GIVING

## A LEGACY GIFT IS OFTEN THE LARGEST GIFT A PERSON CAN MAKE...

A legacy gift is generally in addition to on going tithes and offerings and capital campaigns. It is important to take time to make prayerful and thoughtful consideration of the legacy you would like to leave. Individuals of all income levels can make planned gifts to support Carlisle United Methodist Church. This type of gift speaks to intention and generosity more than net worth.

Each type of gift has various tax benefits. Check with a financial advisor or estate attorney for assistance to select the best giving vehicle for your situation.

If you are giving a legacy gift to the church, please contact the Church Office to let us know so we can express our sincere appreciation now.

## END OF LIFE PLANNING CHECKLIST

Below is a checklist to assess where you are in your end-of-life stewardship planning.

- Do I have an updated will or trust?
- Have I chosen a medical power of attorney?
- Have I chosen a general power of attorney?
- Have I nominated guardianship for my children?
- Do I have a living will?
- Do I have long term care insurance?
- Do I have disability insurance?
- Have I remembered my church and other charitable organization in my will?

# SIMPLE WAYS TO MAKE YOUR LEGACY

## A MAKING A BEQUEST IN YOUR WILL OR TRUST

You may choose to donate a percentage or a specific dollar amount. Bequest could also include appreciated stock, mutual funds, Exchange Traded Funds, real estate and tangible personal property. These types of gifts may offer significant tax benefits.

## B NAMING THE CHURCH AS A BENEFICIARY OF A LIFE INSURANCE POLICY

## C NAMING THE CHURCH AS A BENEFICIARY OF A RETIREMENT ACCOUNT (IRA, 401K OR 403B)

## D CHARITABLE GIFT ANNUITY OR CHARITABLE REMAINDER TRUST

These types of gifts offer the donor guaranteed lifetime fixed income payments and may offer significant tax savings.

## E CHARITABLE LEAD TRUST

Offers significant estate tax benefits.

## F CASH GIFTS

These types of gifts provide a tax deduction and are easy to make if you have liquid assets that are not needed now.