

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

1869
Society



The 1869 Society

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

Why a Planned Gift to United Methodist Women?

A planned gift not only supports the mission of United Methodist Women, it also provides valuable tax benefits to you. For example, all bequests and estate gifts are free from federal estate taxes. Bequests of certain resources, such as retirement plan assets, allow you to give more at a significantly reduced after-tax cost to your other beneficiaries. A planned gift can also memorialize a loved one or minimize tax obligations for your heirs.

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. 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.

With a Planned Gift You Can:

- Create or support an existing endowment fund (such as the Legacy Fund) to further the mission of United Methodist Women and realize the vision of our foremothers to turn faith, hope and love into action. An endowment gift will undergird our service to and advocacy for women, children and youth for the next 150 years.
- Support specific national and international mission programs.

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.

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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 all, 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 designate the total, portion or percentage of your home or property sale proceeds to United Methodist Women.

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. Retirement funds are subject to both income and estate taxes (which can total up to 70 percent). Planned giving can help reduce this tax liability.

IRA Charitable Rollover Gift

If you are age 70 ½ or older, you can consider making a direct transfer gift to United Methodist Women of up to \$100,000 from the annual required minimum distribution of your individual retirement account (IRA).

Life-Income Gift

There are charitable gifts that provide income payments for life, that require special planning and careful consideration. Contact the Development Office for further information.

Endowment Fund

You can contribute to an endowment like the Legacy Fund that provides annual income in perpetuity to carry forward the mission of 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.

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.

“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.
- Be sure to talk with your loved ones about your plans, personal wishes and planned gift options.

Sample bequest language to discuss your estate plan with your financial advisers.

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 nonprofit corporation, 475 Riverside Drive, 15th Floor, New York, New York 10115 for its general purposes.

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. We can provide you with the appropriate language to ensure your gift can be used as you intend.

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 nonprofit corporation, 475 Riverside Drive, 15th Floor, New York, New York 10115 for restricted/specific purposes.

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.