Planned Giving
Overview

The goal of planned giving is to help donors plan their estates and charitable giving in ways that benefit both family and charity such as your local United Methodist church or ministry.

There are several options in making planned gifts that provide tax benefits. This brochure outlines several of those options. Please call the Foundation at 800-259-6863 for more information on these planned giving options, plus other ways to give.

For More Information

☐ 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 __________________________
Address __________________________
______________________________
City____________________________
State/Zip________________________
Home Phone______________________
E-mail__________________________
Church __________________________

Mail to the address below, all inquiries are treated with complete confidentiality.

THE OKLAHOMA UNITED
METHODIST FOUNDATION
4201 Classen Boulevard
Oklahoma City, OK 73118
800-259-6863 www.okumf.org

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<th>YOUR GIFT</th>
<th>YOUR GOAL</th>
<th>HOW IT WORKS</th>
<th>YOUR BENEFITS</th>
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<td>Bequest</td>
<td>• Maintain control of your assets during life</td>
<td>You designate the Foundation or your church as the beneficiary of your asset by will, trust or other instrument.</td>
<td>• Estate tax charitable deduction&lt;br&gt;• Life use and ownership of your property</td>
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<td>Charitable Gift Annuity</td>
<td>• Receive fixed income for life&lt;br&gt;• Avoid capital gains tax on the sale of your appreciated property&lt;br&gt;• Enjoy the benefit of tax savings from a charitable deduction</td>
<td>You transfer your cash or appreciated property to the Foundation in exchange for fixed income (with rates based on your age) for the rest of your life.</td>
<td>• Charitable tax deduction&lt;br&gt;• Fixed income for life&lt;br&gt;• Partial bypass of capital gain&lt;br&gt;• Possible tax-free payments</td>
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<tr>
<td>Charitable Remainder Trust (CRT)</td>
<td>• Transfer your appreciated property without paying capital gains tax&lt;br&gt;• Enjoy regular income for life or a term of years&lt;br&gt;• Receive the benefit of tax savings from a charitable deduction</td>
<td>You transfer your cash or appreciated property to fund a charitable trust with the Foundation. The trust sells your property tax-free and provides you with income for life or a term of years.</td>
<td>• Charitable tax deduction&lt;br&gt;• Income for life or a term of years&lt;br&gt;• Possible income growth over time&lt;br&gt;• Avoidance of capital gains tax</td>
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<td>Charitable Lead Trust (CLT)</td>
<td>• Give cash or property to your family in the future&lt;br&gt;• Avoid substantial gift or estate tax</td>
<td>You transfer your cash or property to fund a lead trust that makes a gift to the Foundation for a number of years. You receive a charitable deduction for the gift. Your family receives the remainder at substantial tax savings.</td>
<td>• Gift or estate tax deduction&lt;br&gt;• Asset and appreciation passes to family at a reduced cost</td>
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<tr>
<td>Life Estate Reserved</td>
<td>• Remain in your home for life.&lt;br&gt;• Receive a charitable income tax deduction</td>
<td>You give your property to the Foundation but retain the right to use the property during your life.</td>
<td>• Charitable tax deduction&lt;br&gt;• Lifetime use of property</td>
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<tr>
<td>Bargain Sale</td>
<td>• Transfer your property and receive cash or debt relief without paying substantial taxes</td>
<td>The Foundation purchases 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.</td>
<td>• Cash from sale&lt;br&gt;• Charitable tax deduction&lt;br&gt;• Partial bypass of capital gain</td>
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