

What Is the First United Methodist Foundation of Mesa?

The church Foundation is a group of church members who are working today to secure a sound financial future for our church tomorrow. The Foundation is responsible to the Board of Trustees for receiving, managing and accounting for all gifts that are not part of the annual operating budget.

What Is Planned Giving?

Current and deferred gifts, which are above and beyond your annual operating pledge are considered planned gifts. They will insure the physical and spiritual presence of First United Methodist Church for years to come. Planned gifts to First United Methodist Foundation of Mesa can be designated for a specific purpose or ministry of your choice. Such gifts can also be undesignated. Use of undesignated gifts is left to the Foundation's discretion.



What Can You Do To Help?

Please consider making current and/or planned gifts to First United Methodist Foundation of Mesa (FUMFM). With favorable tax deductions, such gifts will enable you to meet some of your own financial goals while at the same time helping us secure a sound financial future for our church. To learn more about these important gifts and how they can help you achieve some of your financial goals, complete the form below and mail it to FUMFM at 15 E. First Ave., Mesa, AZ 85210. Instead of mailing, you could drop the form into the collection plate during worship services. Finally, if you prefer, please feel free to call us at (480) 969 - 5577.



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|-----------------------------------------|--------------------------------------------|
| <input type="checkbox"/> CASH GIFTS | <input type="checkbox"/> BEQUESTS |
| <input type="checkbox"/> SECURITIES | <input type="checkbox"/> GIFT ANNUITIES |
| <input type="checkbox"/> REAL ESTATE | <input type="checkbox"/> ENDOWMENTS |
| <input type="checkbox"/> LIFE INSURANCE | <input type="checkbox"/> CHARITABLE TRUSTS |

Your Name

Address

City, State, Zip

Phone

*Working Today to
Secure a Sound Financial
Future for Tomorrow . . .*



**First United Methodist Foundation
of Mesa
15 East First Avenue
Mesa, Arizona 85202
(480) 969 - 5577**

“The Church’s One Foundation is Jesus Christ, her Lord.”

Past

The First United Methodist Church has been a vibrant force in the community of Mesa since a small group of hardy pioneers established our place of worship in 1893. Since then, generations of United Methodists have worked as good stewards to build our current facilities and to support our various ministries in both our local and extended community.

Present

Our newest facility, the Anna Mildred Fitch Family Life



Center, places our church ahead of the curve in Mesa’s renewal project. This facility enables us to expand the ministries we’re providing to our local community.

Future

There is no time for us to rest on our accomplishments. Looking backwards helps us develop a faithful vision for our future. First United Methodist Foundation of Mesa (FUMFM) envisions a financially secure base for our church and all its ministries.

Most people have a desire to be a “positive influence on others around us.” Our church is the same. This brochure is to suggest ways you can help FUMFM to preserve the presence of our church, its ministries and their vital role in our community for future generations.

CURRENT GIFTS

Cash. There is no easier way to support the work of the body of Christ and to qualify for a charitable deduction at the same time than by simply writing a check! Most gifts are in the form of cash via a check.

Securities. Giving long-term appreciated stocks or bonds offers you a two-fold tax saving. First, you avoid paying capital gains taxes on the increased value of your securities. In addition, you qualify for a tax deduction equal to the fair market value of the security on the date of its receipt.

Real Estate. If you have owned a vacation home, acreage, or a farm for many years, a charitable gift of real estate can be especially tax-advantageous. The property may have appreciated in value over the years so much that its sale would result in a sizable capital gains tax. Instead, if given outright, you avoid the tax and, at the same time, realize a charitable deduction for the full fair market value of the property.

Life Insurance. If you own a life insurance policy that is no longer needed, then it is a perfect vehicle for a charitable gift. To receive a charitable deduction for gifts of this type, you must name the church as both the owner and the beneficiary of the policy. You can take a charitable deduction equal to the policy’s cash surrender value at the time of the gift.

DEFERRED GIFTS

Bequests. The church can be named as a beneficiary of your estate through a **Specific Bequest** that identifies a specific dollar amount, or specific property as a gift. A **Percentage Bequest** keeps all estate distributions in proportion to one another. Consider **titing your estate** through your Last Will and Testament or Revocable Living Trust by naming the church as a 10% beneficiary of your estate. A **Residual Bequest** identifies the church as a beneficiary after final debts, taxes and other specific bequests have been addressed. The **Contingent Bequest** provides for distributions to a secondary beneficiary if the primary beneficiary fails to survive the donor.

Gift Annuity. This giving vehicle is part gift and part annuity. It is a contract by which the church agrees to pay you a guaranteed, fixed, lifetime income in return for your partially tax-deductible, irrevocable gift.

Charitable Trust. There are several types of these Trusts. The most common is the CRT or Charitable Remainder Unitrust. It is used to enable the donor to donate highly appreciated assets, avoid capital gains taxes and provide life-time income for the donor and other beneficiaries. Upon death of the last surviving beneficiary, the trust distributes the remainder of its assets to the church.

Endowment. Continue making an annual gift after death by designating a gift from your estate as an Annual Pledge Endowment Fund. Earnings from your endowment fund will be used annually; the principal shall never be invaded. If the gift from your estate is large enough, then earnings from your endowment fund could equal or exceed your current level of giving. Such a gift would continue your support of our church long after your passing.